Direct Data Entry

User Manual

Rev 8 – 02/26/2010

The Ohio Department of Aging
50 W. Broad Street, 9th floor
Columbus, OH 43215
(614) 466-5500, (800) 266-4346

Table of Contents

1. System requirements 1
2. How to Login 1
3. Session timeout 1
4. Security Certificate 2
   a) Firefox 2
   b) Internet Explorer 3
5. Maintenance and System Outages 5
6. Forgotten password 5
7. Forgotten User Name 5
8. Who to call for help 5
9. User Roles 5
   a) PAA Administrator 5
   b) PAA Operator 5
   c) Provider Operator Invoice and Reports 5
   d) Provider Operator Reports only 5
   e) Fiscal Intermediary 5
10. Menus 6
   a) Invoices Screen 6
   b) Reports Screen 6
   c) Maintenance Screen 6
   d) Print 7
   e) Logout 7
11. Invoice Entry – PASSPORT 7
   a) Start New Invoice – PAA Administrator or PAA Operator Role 7
   b) Start New Invoice – Provider Operator Role 8
   c) Enter Invoice Details – All Roles 8
   d) Next steps – All Roles 12
12. Invoice Entry – CHOICES 12
   a) Enter Invoice Details 12
   b) Next steps 16
13. Edit or Delete an Invoice 16
   a) Remove/Delete Invoice 16
   b) Detail line Row Count 16
   c) Search Detail Lines 17
   d) Edit Units – PASSPORT Invoice 17
   e) Edit Rates – PASSPORT Invoice 18
   f) Edit Units and Rates – Choices Invoice 18
   g) Delete a Line 19
   h) Edit an Individual Detail Line – PASSPORT Invoice 19
   i) Edit an Individual Line – Choices Invoice 20
14. Submit Invoice 21
15. Generate a Coversheet 22

16. Invoice Status Views 23
a) Invoices by Status score card 23
b) Invoice Views Available – PIMS and Choices 23
c) Filter the List – Submitted Invoices only 24
17. Reports 25
a) Invoice Report 25
b) Consumer List – PASSPORT or Choices 26
c) Services List – PASSPORT and Choices 28
d) Choices Provider List 29
e) Download Electronic Data Interchange (EDI) Reports 29
f) Usage Stats 31
18. Maintenance 32
a) Change My Password 32
b) Change My Email Address 32
c) Research Assistant 33
d) User Maintenance and Email Lists 33

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Direct Data Entry (DDE) User Manual

The Direct Data Entry (DDE) billing system is one of the replacements for the Data Entry Module (DEM) currently used by many Pre-Admission Screening System Providing Options and Resources Today (PASSPORT) providers to enter and submit PASSPORT Information Management System (PIMS) invoices to PASSPORT Administrative Agencies (PAAs).

Changes/updates made in PIMS to a consumer will be reflected in DDE system the following day. Updates from PIMS to the DDE system are made nightly.

1. System requirements

The minimum PC requirements to utilize the DDE application are 512mb system memory and an operating system capable of running one of the following browser versions (or higher) with JavaScript enabled: Mozilla/4.0+, Mozilla/5.0+, MS Internet Explorer 6.0+, Gecko/20060728+, Firefox/1.5.0.6 +.

2. How to Login

a) Open a browser.

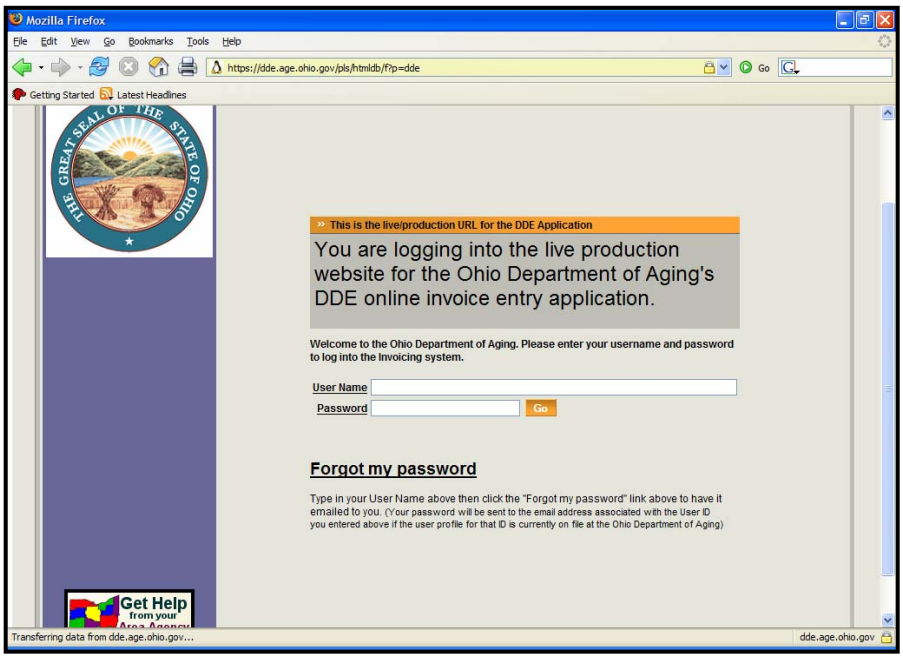
b) In the address bar enter: https://dde.age.ohio.gov/

c) Press enter. This site can be bookmarked.

d) If prompted for a Security Certificate, proceed to Section 4. Security Certificate

e) Enter your user name and password provided to you by your PASSPORT Administrative Agency. Press enter. Username and password are not case-sensitive. If prompted by the browser to save password, decline.

f) If the user attempts to login with an invalid password and exceeds the number of attempts allowed by the system, the account will be disabled. Contact your PAA administrator regarding your account status.



3. Session timeout

A user's session will timeout after 60 minutes of inactivity. If, for a period of time, you leave the DDE application alone or perform actions (ex: scrolling, entering data, reading a downloaded report) that does not generate a call to the server, the application logs you out and you will be prompted to log in again. A timer will appear on the screen and count down to inform the user when the session will expire. **Ex:** ***Your session will expire in 00:59:48***.

4. Security Certificate

Always accept or install the website's security certificate when prompted by the web browser. It is a valid certificate issued from the State of Ohio's Office of Information Technology.

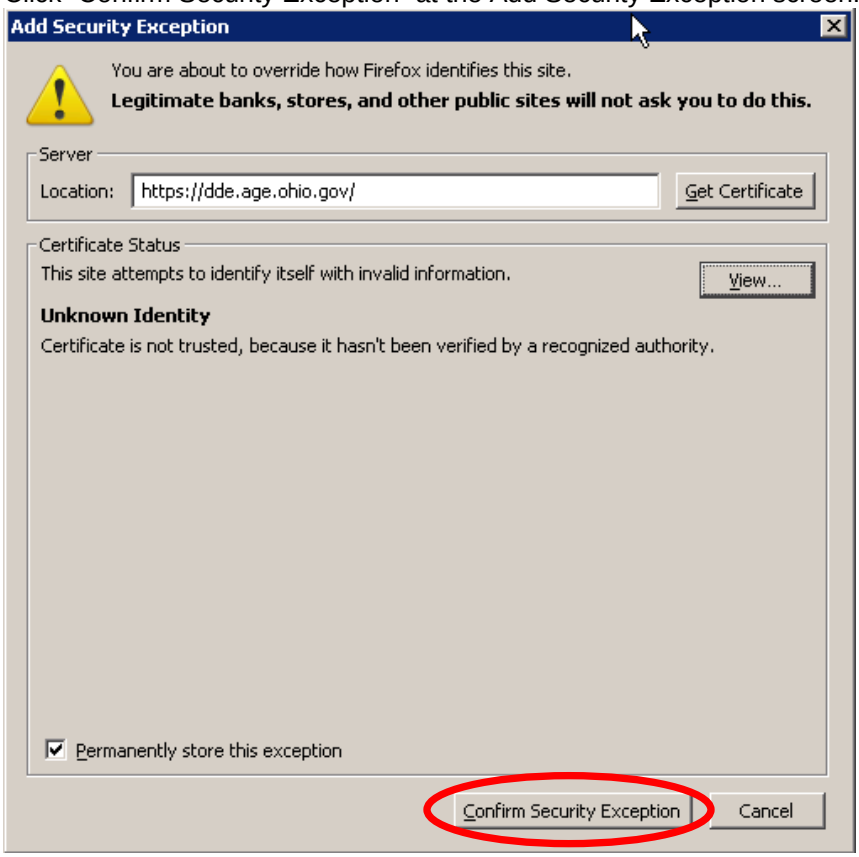
a) Firefox

(1) The "This Connection is Untrusted" screen will display.

(2) Click "I Understand the Risks."

(3) Click "Add Exception."

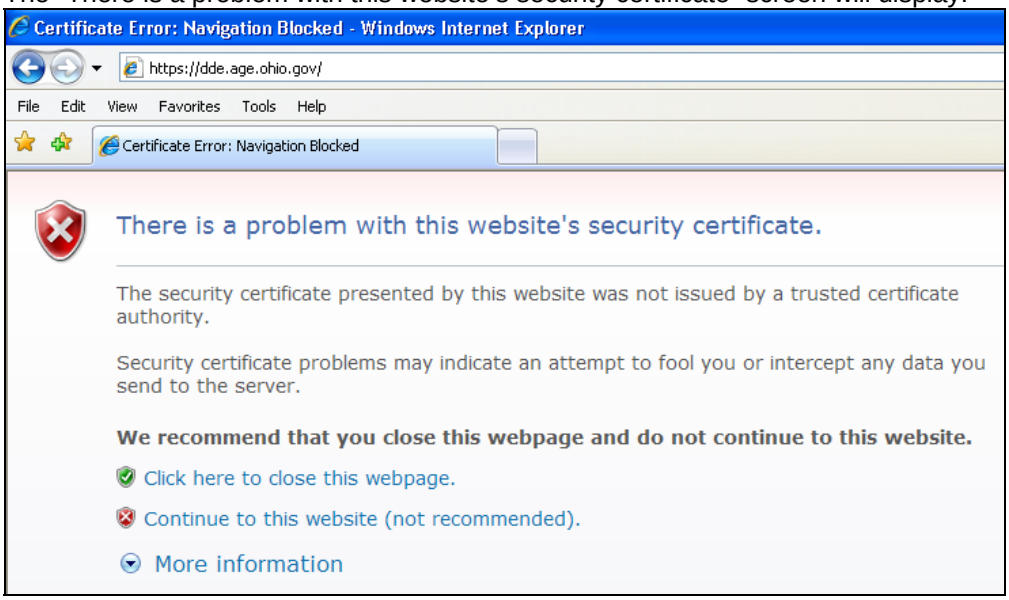
(4) Click "Confirm Security Exception" at the Add Security Exception screen.



4. Security Certificate (cont'd.)

b) Internet Explorer

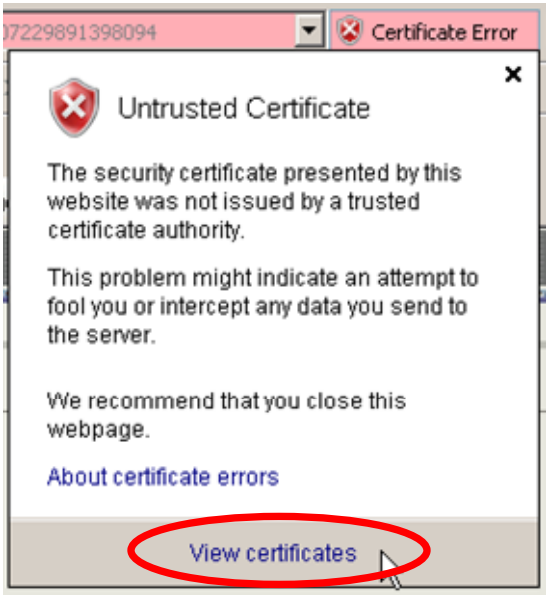
(1) The "There is a problem with this website's security certificate" screen will display.



(2) Click "Continue to this website."

(3) Click "Certificate Error" in the upper right hand corner.

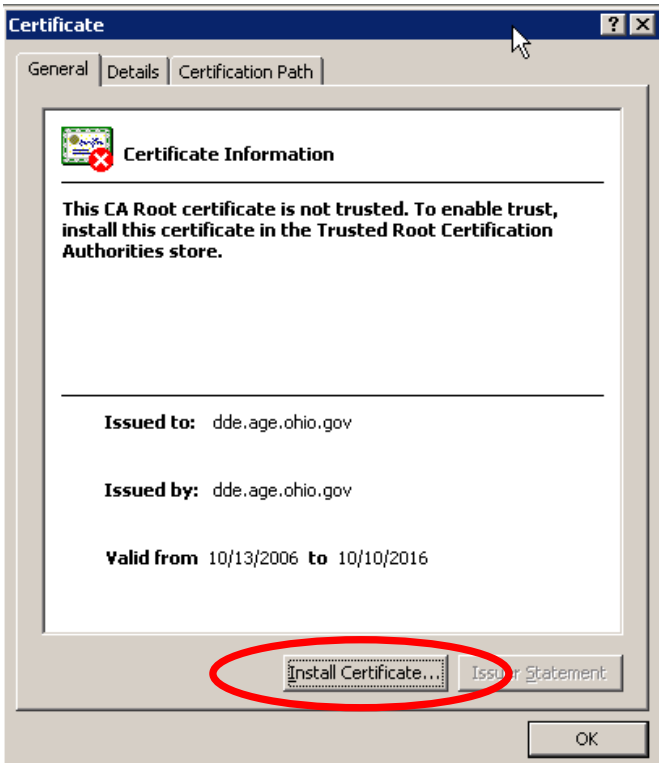
(4) Click "View Certificates" at the Untrusted Certificate screen.



4. Security Certificate (cont'd.)

b) Internet Explorer (cont'd.)

(5) Click "Install Certificate" at the Certificate window.

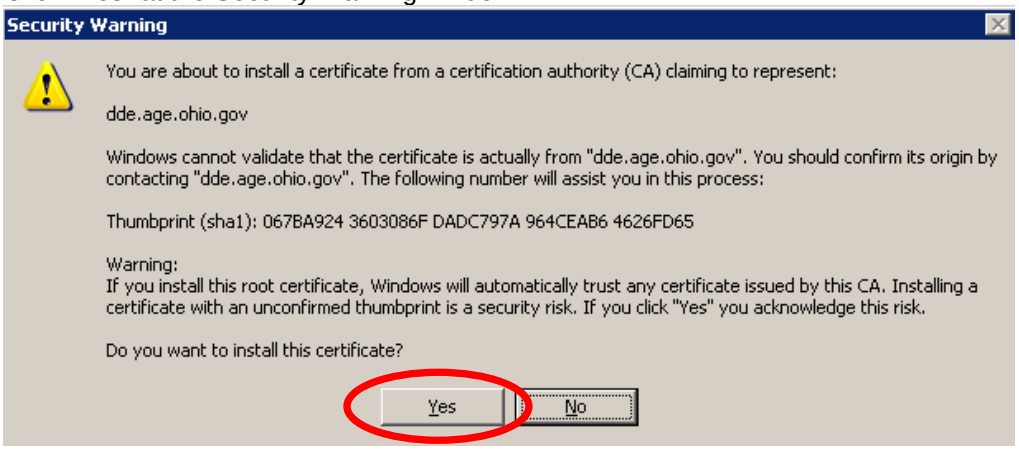


(6) Click "Next" at the Certificate Import Wizard window.

(7) Click "Next" at the Automatically select the certificate store based on the type of certificate prompt.

(8) Click "Finish" at the Completing the Certificate Import Wizard window.

(9) Click "Yes" at the Security Warning window.



(10) Click "Ok" at The import was successful prompt.

(11) Click Ok to close the Certificate window.

5. Maintenance and System Outages

- When the DDE application is unavailable for maintenance, the screen will display:
  The DDE is currently unavailable while maintenance is being performed. Please try again in 30 minutes.

- If there is a system outage and the application is unavailable, the screen will display:
  Page not found or Service Temporarily Unavailable. The server is temporarily unable to service your request due to maintenance downtime or capacity problems. Please try again later.

6. Forgotten password

a) Type in your User Name then click, **Forgot my password**.

b) The password will be sent to the email address associated with the User Name profile. A deactivated account cannot request their password to be reset.

7. Forgotten User Name

Contact your PAA for a forgotten User Name.

8. Who to call for help

Contact your PAA for assistance with the application.

9. User Roles

- There are five roles available in DDE. Your role is determined by your PAA.
- Once logged in, the options available and the data displayed will vary depending on your Role ID.
- The screen will indicate in green text your login Role ID.
  Ex: **Welcome 6vkorteprov, you are logged on and working as a Provider Operator.**

a) PAA Administrator

- Controls accounts created under specific PAA and can perform data entry and view reports for provider operators within PAA.

b) PAA Operator

- Performs data entry and view reports for provider operators within PAA.

c) Provider Operator Invoice and Reports

- Performs data entry and can generate reports for their authorized locations in a PAA.

d) Provider Operator Reports only

- Generates reports for their authorized locations in a PAA.

e) Fiscal Intermediary

- Performs CHOICES data entry and can generate reports for their authorized PAA.

10. Menus

a) Invoices Screen

The options available and the data displayed are based on your role in DDE.

Invoices Screen	Invoice Status	Choices Invoice Entry	Work As a Provider
PAA Administrator *	X	X **	X
PAA Operator *	X	X **	X
Fiscal Intermediary	X	X **	
Provider Operator	X	X ***	

***** To start an invoice, these Roles must work on behalf of a provider.
** Able to invoice Choices services on behalf of all providers.
*** Choices Invoice Entry screen only displays the provider operator's Choices consumers.

b) Reports Screen

The options available and the data displayed are based on your role in DDE.

Reports Screen	Invoice Report	Consumer List	Services List	Choices Provider List	Download EDI Reports	Usage stats**
PAA Administrator *	X	X	X	X	X	X
PAA Operator *	X	X	X	X	X	
Fiscal Intermediary	X	X	X	X		
Provider Operator	X	X	X		X	
Provider Operator Reports Only					X	

***** To view the Consumer List, Services List and Download Electronic Data Interchange (EDI) Reports, these Roles must work on behalf of a provider.

****** This function is covered in detail in the PAA Administrator Role User Maintenance Manual.

c) Maintenance Screen

The options available and the data displayed are based on your role in DDE.

Maintenance Screen	Change My Password	Change my Email Address	Research Assistant	Email Lists **	User Maintenance **
PAA Administrator	X	X	X	X	X
PAA Operator	X	X	X		
Fiscal Intermediary	X	X			
Provider Operator	X	X			
Provider Operator Reports Only	X	X			

****** These functions are covered in detail in the PAA Administrator Role User Maintenance Manual.

10. Menus (cont'd.)

d) Print

(1) Print option is available for All Roles.

(2) **Click Print** (button located in upper right hand corner of screen) to convert the information on the page to a printer friendly view.

(3) **Click File** (in IE7 it might be necessary to press the Alt key to display the browser's main menu), select **Print**. Confirm the Printer, click Ok.

(4) **Click** the browser's **Back** button to return to the application.

e) Logout

(1) Logout is available for All Roles.

(2) **Click Logout** (button located in upper right hand corner of screen) to end the session.

11. Invoice Entry – PASSPORT

To enter a PASSPORT invoice you must be logged in as a Provider Operator, a PAA Administrator or PAA Operator working on behalf of a provider location.

NOTE: Changes/updates made in PIMS to a consumer will be reflected in DDE system the following day. Updates from PIMS to the DDE system are made nightly.

a) Start New Invoice – PAA Administrator or PAA Operator Role

The PAA shall only enter an invoice on behalf of a provider once the provider has submitted the invoice to the PAA in paper form. At no time shall a PAA enter an invoice into the DDE application for a provider until receipt of this paper invoice.

(1) Login as PAA Administrator or PAA Operator.

(2) From the Invoices screen, **click Work as a Provider**.

(3) The first 25 rows of provider names will display.

Username	PAA	Name	Company	email	Work Phone
1odokey	PAA 6	Okey Dokey	Almost Family	okey@dokey.com	5135551212
6aahmed	PAA 6	Ahmed Ahmed Asakir Medical Transportation	Asakir Medical Transportation	ahmed1499@hotmail.com	-
6abrown	PAA 6	Alesha Brown Msi/Medical Supply Inc.	MSI/Medical Supply Inc.	abrown@rpromise.com	-
6adiini	PAA 6	Abdikani Diini	Columbus Global Home Health Services Inc.	cghhs@insight.rr.com	614-337-2580
6ahoge	PAA 6	Anita Hoge Arlingworth Health Inc.	Arlingworth Health Inc.	ahh@capitalhs.com	-
6ahurre	PAA 6	Adam Hurre Franklin Transportation Resources, Ince	Franklin Transportation Resources, Ince	daale0101@yahoo.com	-
6akaib	PAA 6	Ashley Kaib Embrace Home Healthcare, Llc.	Embrace Home Healthcare, LLC.	embrace4@sbcglobal.net	-
6akotee	PAA 6	Agustin Kotee Arrowlink Transport, Inc.	Arrowlink Transport, Inc.	info@arrowlinktransport.com	-

(4) **Click Next** to display the next series of rows, **click Previous** to go back a series of rows.

(5) Click a column heading to sort in ascending or descending order.

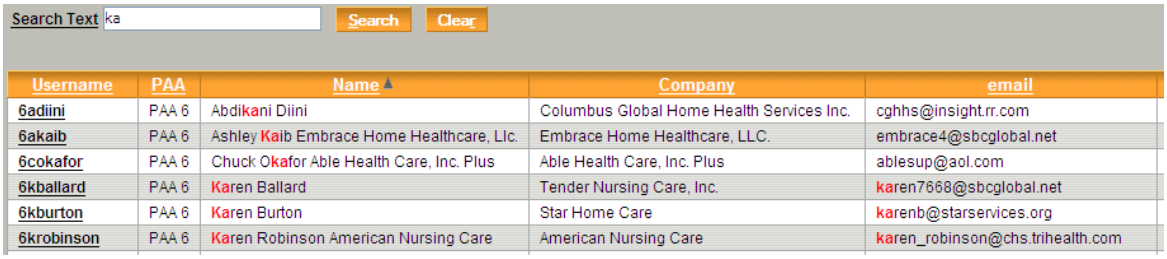
11. *Invoice Entry (cont'd.)*

a) Start New Invoice – PAA Administrator or PAA Operator Role (cont'd.)

(6) To search for a Provider:

i. **Enter a search string** in the Search Text text box.

ii. **Click Search**. Select a name from the list that populates. If necessary, **click Clear** to clear the text box and display the entire list.



(7) **Select a name**. The application will indicate the Username you are working on behalf of.
Welcome 6dbrownoper, you are registered as a PAA Operator working on behalf of 6adiini

(8) **Click Start a New Invoice** and go to **Section 11. c)** Enter Invoice Details – All Roles.

(9) **Click Work As Myself** to logout of the provider location you are working on behalf of.

b) Start New Invoice – Provider Operator Role

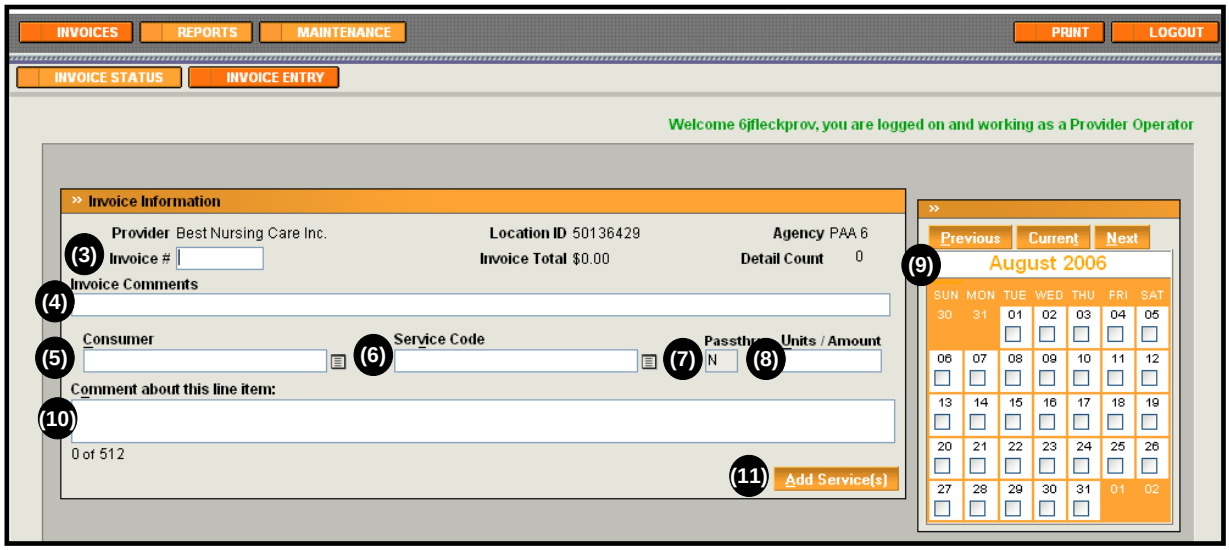
(1) Login as Provider Operator.

(2) **Click Start a New Invoice** and go to **Section 11. c)** Enter Invoice Details – All Roles.

c) Enter Invoice Details – All Roles

(1) User is logged in as a Provider Operator, a PAA Admin or PAA Operator working on behalf of a provider location.

(2) From the Invoices screen, **click Start a New Invoice**. The blank Invoice Entry screen appears.



11. Invoice Entry (cont'd.)

c) Enter Invoice Details – All Roles (cont'd.)

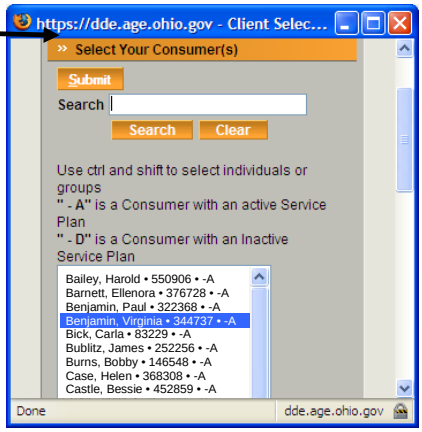
(3) **Invoice #**: Enter an invoice number. Character limit is 10 characters.

(4) **Invoice Comments**: If necessary, enter a comment to describe the invoice.

(5) **Consumer**:

i. **Click** the **Consumer list icon** to populate a list of consumers. The consumers listed are specific to the Location ID logged in as.

- An "A" after a name is a consumer with an active Service Plan. These are sorted first.
- A "D" after a name is a consumer with an Inactive Service Plan.



ii. To **select individual** (non-adjacent) **consumer**(s), hold the CTRL key down and left click on the consumer's name.

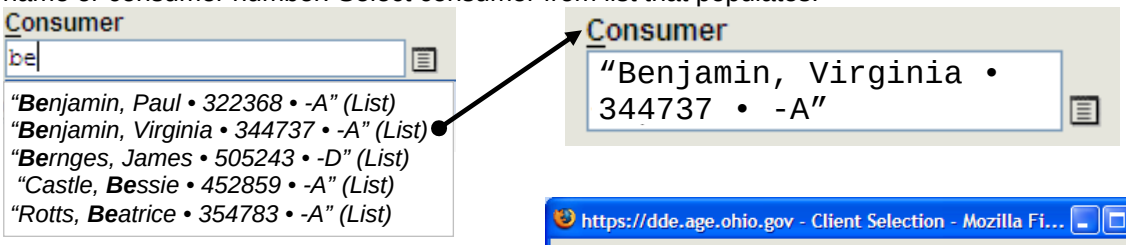
iii. To **select a range** (group) of **consumers**, left click on the first name of the range then hold down the left mouse button and drag the cursor to the last name of the range. Release the mouse button.

iv. To Search for a consumer, type a search string in the Search text box, **click Search**.

v. **Click Submit** to add the selected consumer(s) to invoice.

OR

vi. Use auto complete feature. In Consumer text box type any part of the consumers first, last name or consumer number. Select consumer from list that populates.



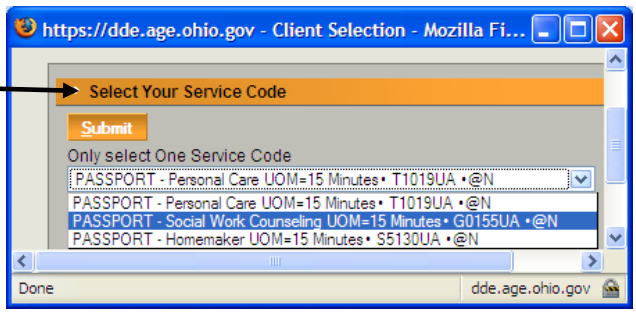
(6) **Service Code**:

i. **Click** the **Service Code list icon** to populate the list of available Service Codes.

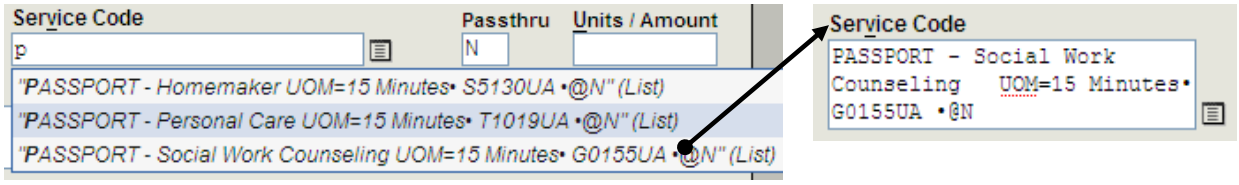
ii. Select only one Service Code.

iii. **Click Submit**.

OR



iv. Use auto complete feature. Type the first characters(s) of service code description or service code number. Select service code from list that populates. Displayed will be a description of service code, unit of measure, service code number and if it is a Passthru or not – @N or @Y.



11. Invoice Entry (cont'd.)

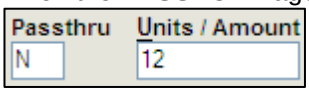
c). Enter Invoice Details – All Roles (cont'd.)

(7) **Passthru**:

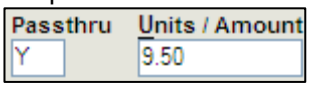
i. User cannot change Passthru code. Value is based on Service Code selected.
ii. If you attempt to change Passthru code, an error will appear.

(8) **Units/Amount**:

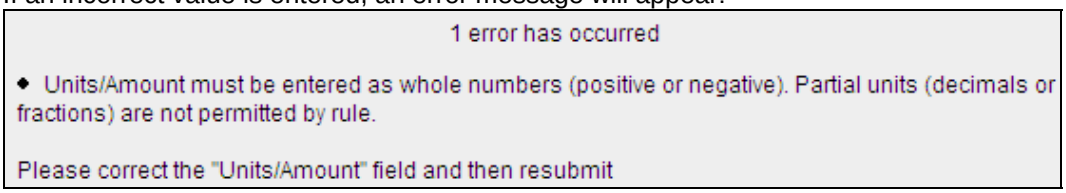
i. When the service code is a non-passthru (**Passthru = N**), **enter a whole number** (positive or negative). Amounts do not appear for non-passthru services. Amounts will be applied when the PASSPORT agency receives the invoice.



ii. When the service code is a passthru (**Passthru = Y**), **enter appropriate dollar amount** for the passthru services.

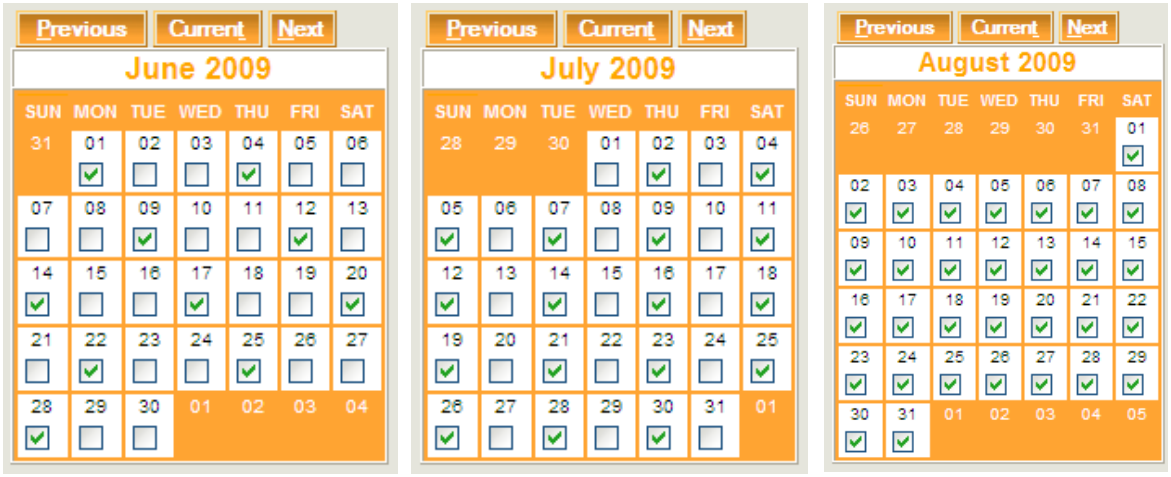


iii. If an incorrect value is entered, an error message will appear:



(9) **Service Date(s)**:

i. At least one Service Date must be selected from the calendar.



11. Invoice Entry (cont'd.)

c). Enter Invoice Details – All Roles (cont'd.)

(9) Service Date(s) (cont'd.)

ii. Click Previous to display the previous month, click Current to display the current month and click Next to display the next month.

iii. Date(s) can be selected by:
- Clicking the check box under the date to select an individual day or days
- Clicking the name of the week (Sun, Mon, etc.) to select all those days for the month
- Clicking the month to select all the days in that month

iv. Date(s) can be de-selected by:
- Clicking the checkmark on the individual date(s)
- Clicking the name of the week
- Clicking the month

(10)**Comment about this line item**: If necessary, type a comment about this service code. Limit of 512 characters.

(11)**Add Service(s)**:

i. **Click Add Service(s)**, After consumer(s), service code, date(s) and comments are selected/entered.

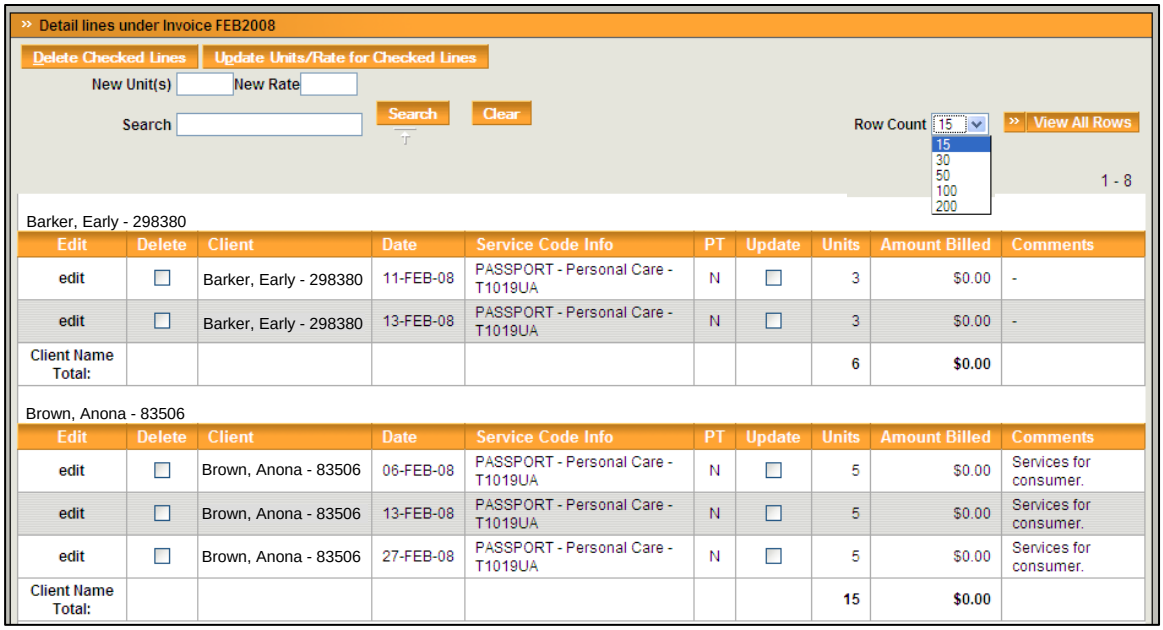
ii. This will populate the Detail Lines section and a confirmation will be generated by the system: Detail record(s) added successfully.

iii. Once Add Service(s) is clicked, an invoice draft is automatically saved in the system and added to the "Invoices in Progress" list, and remains in "Invoices in Progress" status until submitted.

(12)**Detail Lines**:

i. Invoice Detail Lines section is group and sorted by consumer.

ii. For performance purposes, 200 rows is the maximum number of detail lines that will display during invoice entry.



11. Invoice Entry (cont'd.)

c). Enter Invoice Details – All Roles (cont'd.)

(12)Detail Lines (cont'd.)

i. **Click View All Rows** to see all Detail Lines for the invoice. This will take you to another screen displaying all details for the invoice.

ii. **Click Edit this Invoice** to return to invoice entry screen.

(13)Repeat steps (5) thru (11) to bill for additional service(s) for a consumer(s) on same invoice.

d) Next steps – All Roles

(1) **Submit the invoice**. Proceed to Section 14. Submit Invoice.

OR

(2) **Edit the invoice** before submitting. Proceed to Section 13. Edit or Delete an Invoice.

OR

(3) **Stop and finish the invoice later**. Once Add Service(s) is clicked or when an action/modification is made to the invoice, an invoice draft is saved and added to the "Invoices in Progress" list. Proceed to Section 16. Invoice Status Views.

OR

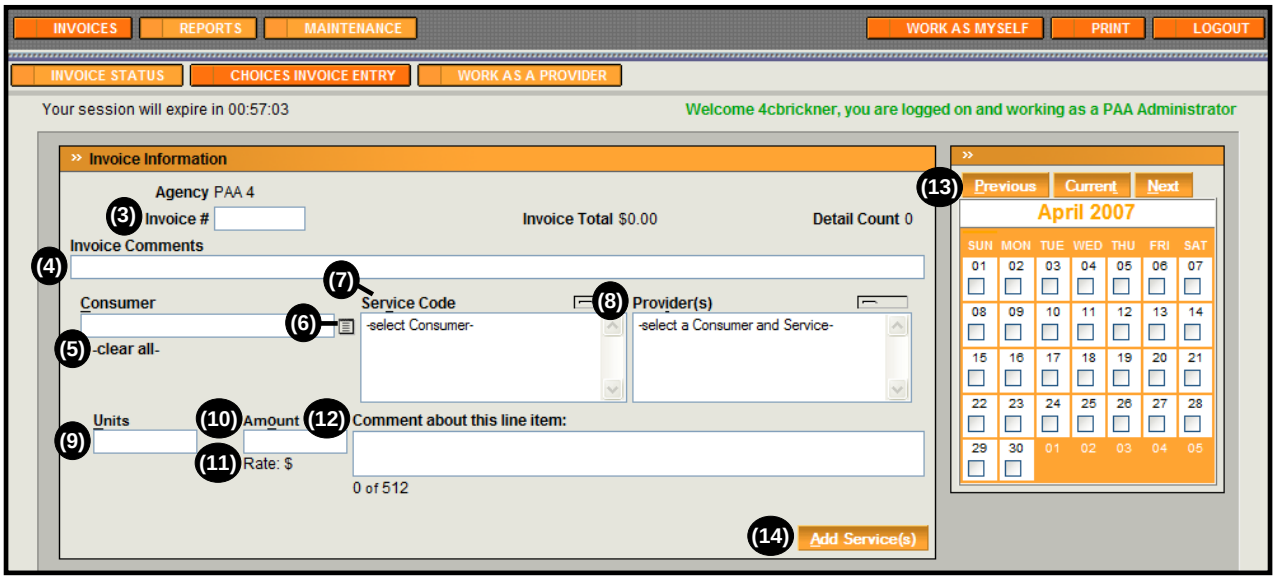
(4) **Delete the invoice**, if it was started it error. If necessary, edit the invoice (see Section 13) and **click Remove Invoice**.

12. Invoice Entry – CHOICES

a) Enter Invoice Details

(1) User is logged in as a PAA Administrator, PAA Operator, Fiscal Intermediary (these roles can invoice Choices services on behalf of all providers) or Provider Operator (Choices Invoice Entry screen only displays the provider's Choices consumers).

(2) From the Invoices screen, **click CHOICES Invoice Entry**. Blank invoice Entry screen appears.



(3) **Invoice #**: **Enter an invoice number**. Limit is 10 characters.

(4) **Invoice Comments**: If necessary, enter a comment to describe the invoice.

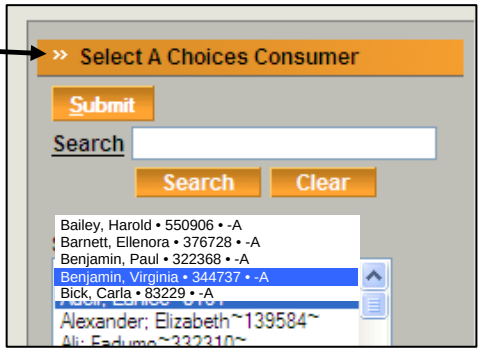
12. Invoice Entry – CHOICES (cont'd.)

a) Enter Invoice Details (cont'd.)

(5) **Clear All**:
Click –clear all– to clear all entries in the Invoice Information area.

(6) **Consumer**:

i. **Click** the **Consumer List icon** to populate a list of consumers. The consumers listed are specific to the PAA or provider operator.

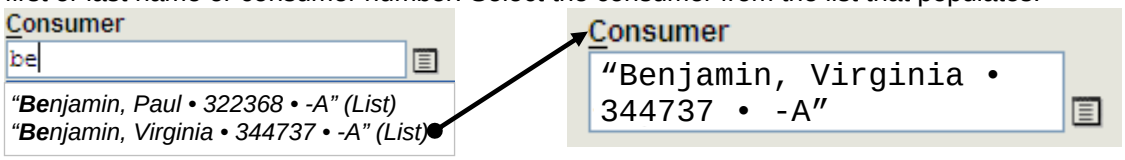


ii. To Search for a consumer, type a search string in the Search text box, click Search.

iii. **Select only one consumer** and **click Submit**. If you attempt to select more than one, an error message will be returned.

OR

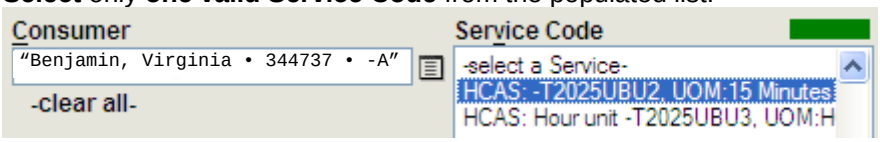
iv. Use the auto complete feature. In the Consumer text box, type any part of the consumers first or last name or consumer number. Select the consumer from the list that populates.



(7) **Service Code**:

i. A list of valid Service Codes display based on the consumer selected.

ii. **Select** only **one valid Service Code** from the populated list.



(8) **Provider(s):**

PAA Administrator, PAA Operator, Fiscal Intermediary Roles:

i. A list of valid Providers displays based on the valid Service Code and Consumer selected. Selecting a different Service Code may result in additional/different Provider(s) to display.

ii. **Select** at least **one valid Provider** from the list provided. More than one valid Provider can be selected.

Provider Operator Role:

iii. When logged in as a Provider Operator role, only the provider's location displays as a valid selection.

iv. **Select Provider**.

12. Invoice Entry – CHOICES (cont'd.)

a) Enter Invoice Details (cont'd.)

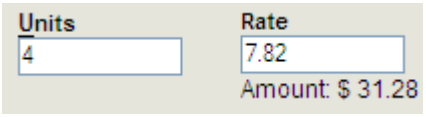
(9) **Units**:

i. **Enter Units** of service provided to the Consumer by the selected Provider(s).

ii. If more than one Provider is selected, Units are applied to each Provider at amount entered in this field.

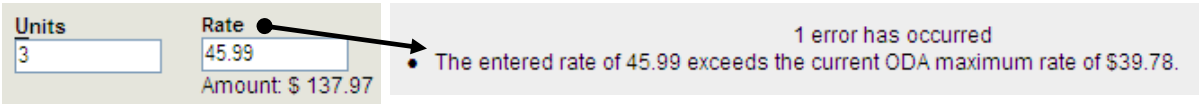
(10)**Amount and Rate**:

i. **Enter total Amount** (Units times Rate) that is to be paid to the Provider(s) for the selected Service for Units entered. This is a daily "Amount" and will be carried over to all Service Dates selected in the calendar.



ii. If more than one Provider is selected, the Amount is applied to each Provider selected.

iii. **Rate cap is $39.78**. If the calculated rate exceeds the $39.78 cap, an error message will display. Correct the rate entered.

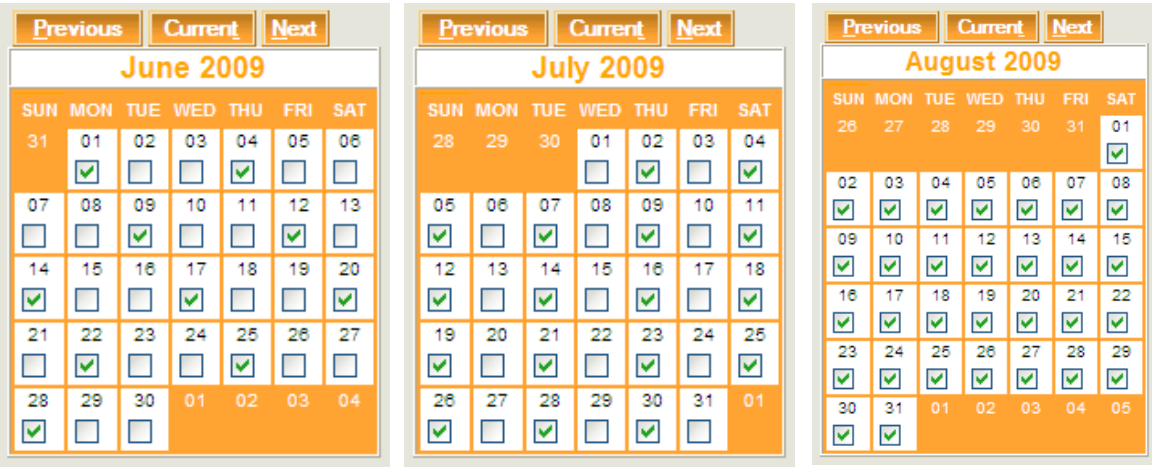


(11)**Comment about this line item**:

If necessary, type a comment about this service code. Limit of 512 characters.

(12)**Service Date(s)**:

i. At least **one Service Date must be selected** from the calendar.



ii. Click Previous to display the previous month, click Current to display the current month and click Next to display the next month.

iii. Date(s) can be selected by:
- Clicking the check box under the date to select an individual day or days
- Clicking the name of the week (Sun, Mon, etc.) to select all those days for the month
- Clicking the month to select all the days in that month

iv. Date(s) can be de-selected by:
- Clicking the checkmark on the individual date(s)
- Clicking the name of the week
- Clicking the month

12. Invoice Entry – CHOICES (cont'd.)

a) Enter Invoice Details (cont'd.)

(13)**Add Service(s)**:

i. After consumer(s), service code(s), provider(s), date(s) and comments are selected/entered; **click Add Service(s)**.

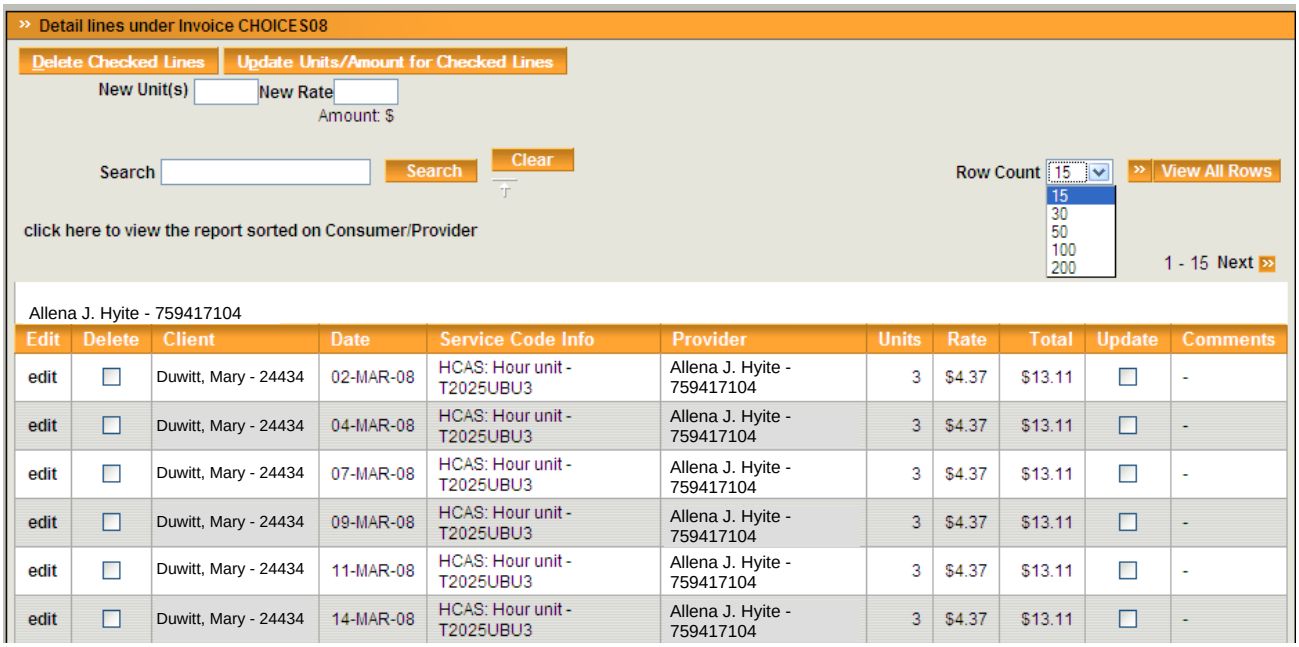
ii. This will populate the Detail Lines section and a confirmation will be generated by the system: Detail record(s) added successfully.

iii. Once Add Service(s) is clicked, an invoice draft is automatically saved in the system and added to the "Invoices in Progress" list, and remains in "Invoices in Progress" status until submitted.

(14)**Detail Lines**:

i. Invoice Detail Lines section is group and sorted by consumer.

ii. For performance purposes, 200 rows is the maximum number of detail lines that will be displayed during invoice entry.



Edit	Delete	Client	Date	Service Code Info	Provider	Units	Rate	Total	Update	Comments
edit	☐	Duwitt, Mary - 24434	02-MAR-08	HCAS: Hour unit - T2025UBU3	Allena J. Hyite - 759417104	3	$4.37	$13.11	☐	-
edit	☐	Duwitt, Mary - 24434	04-MAR-08	HCAS: Hour unit - T2025UBU3	Allena J. Hyite - 759417104	3	$4.37	$13.11	☐	-
edit	☐	Duwitt, Mary - 24434	07-MAR-08	HCAS: Hour unit - T2025UBU3	Allena J. Hyite - 759417104	3	$4.37	$13.11	☐	-
edit	☐	Duwitt, Mary - 24434	09-MAR-08	HCAS: Hour unit - T2025UBU3	Allena J. Hyite - 759417104	3	$4.37	$13.11	☐	-
edit	☐	Duwitt, Mary - 24434	11-MAR-08	HCAS: Hour unit - T2025UBU3	Allena J. Hyite - 759417104	3	$4.37	$13.11	☐	-
edit	☐	Duwitt, Mary - 24434	14-MAR-08	HCAS: Hour unit - T2025UBU3	Allena J. Hyite - 759417104	3	$4.37	$13.11	☐	-

iii. **Click View All Rows** to see all Detail Lines for the invoice. This will take you to another screen displaying all details for the invoice.

iv. **Click Edit this Invoice** to return to invoice entry screen.

(15)**Repeat steps** (6) thru (13) to bill for additional service(s) for a consumer(s) on same invoice.

12. Invoice Entry – CHOICES (cont'd.)

b) Next steps

(1) **Submit the invoice**. Proceed to Section 14. Submit Invoice.

OR

(2) **Edit the invoice before submitting**. Proceed to Section 13. Edit or Delete an Invoice.

OR

(3) **Stop and finish the invoice later**. Once Add Service(s) is clicked or when an action/modification is made to the invoice, an invoice draft is saved and added to the "Invoices in Progress" list. Proceed to Section 16. Invoice Status Views.

OR

(4) **Delete the invoice**, if it was started it error. If necessary, edit the invoice (see Section 13) and **click Remove Invoice**.

OR

(5) Start a new Invoice. Click Start a New Invoice to start a new invoice. The invoice that was not submitted is saved in Work in Progress.

13. Edit or Delete an Invoice

Only invoices in progress can be edited or deleted. User is logged in as a Provider Operator, a Fiscal Intermediary, a PAA Admin or a PAA Operator working on behalf of a provider location.

a) **Remove/Delete Invoice**

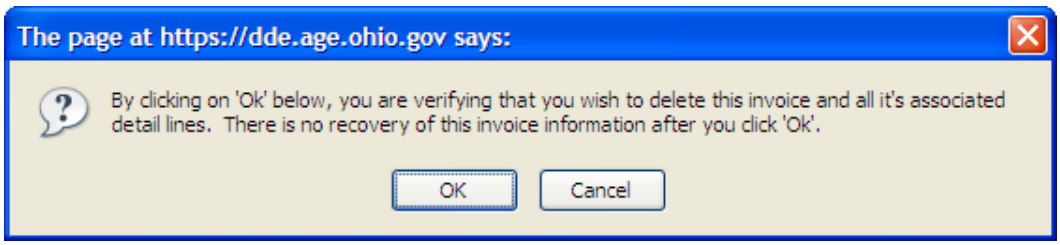
NOTE: A deleted invoice cannot be recovered.

(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be deleted from the Invoices in Progress table.

(3) **Click Remove Invoice**.

(4) **Click Ok**. You will return to the Invoice screen.



b) **Detail line Row Count**

(1) The first 15 rows of billing detail is displayed. **Click Next** to display the next 15 rows. **Click Previous** to show the previous 20 rows.

(2) Click the row count drop down to display additional rows. For performance purposes, a maximum of 200 rows will be displayed.

(3) To view all rows, **click View All Rows**. **Click Edit this Invoice** to return to the Invoice.

13. Edit or Delete an Invoice ***(cont'd.)***

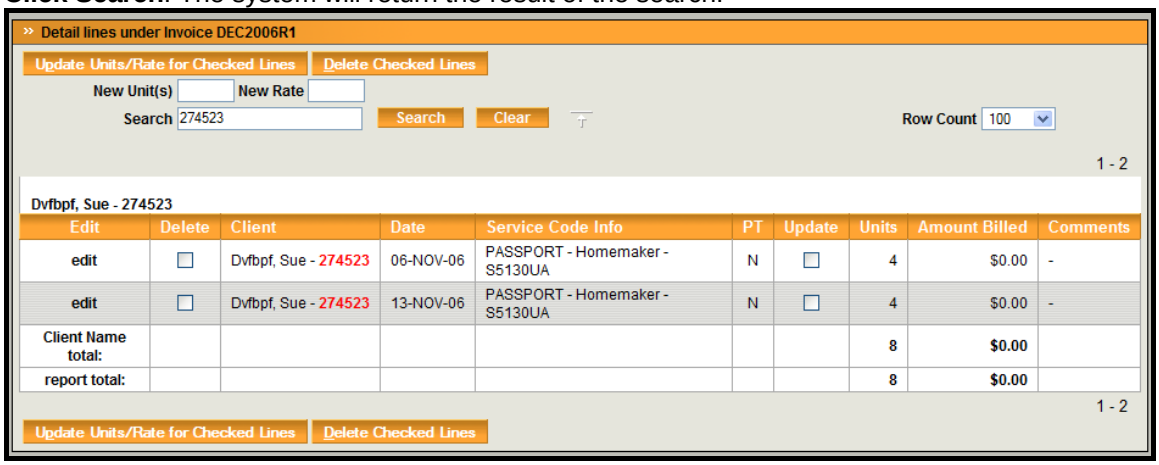
c) **Search Detail Lines**

(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be searched from the Invoices in Progress table.

(3) In the Detail Line section, **enter text or date in the Search text box**. The Client, Date and Service Code Info columns will be searched.

(4) **Click Search**. The system will return the result of the search.



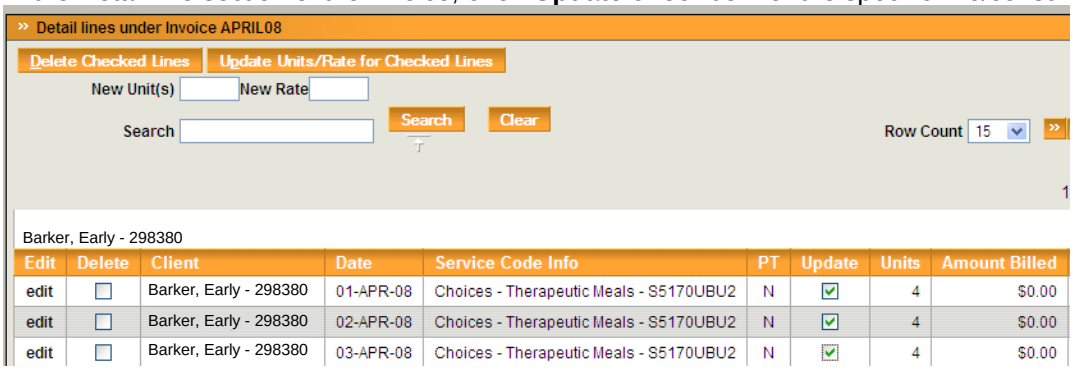
(5) **Click Clear** to clear out the search results and display all detail lines of the invoice.

d) **Edit Units** – PASSPORT Invoice

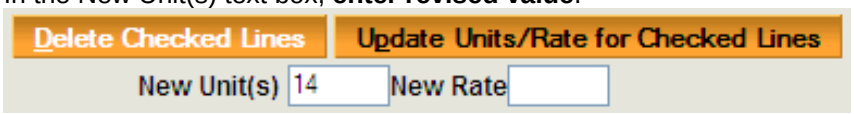
(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be edited from the Invoices in Progress table.

(3) In the Detail line section of the invoice, **click Update checkbox** for the specific line/consumer.



(4) In the New Unit(s) text box, **enter revised value**.



(5) **Click Update Units/Rate for Checked Lines**.

(6) Confirmation will be generated by the system: Changes to Units/Rate for selected Consumers were made as requested. The change(s) will be reflected in the Detail lines section.

13. Edit or Delete an Invoice ***(cont'd.)***

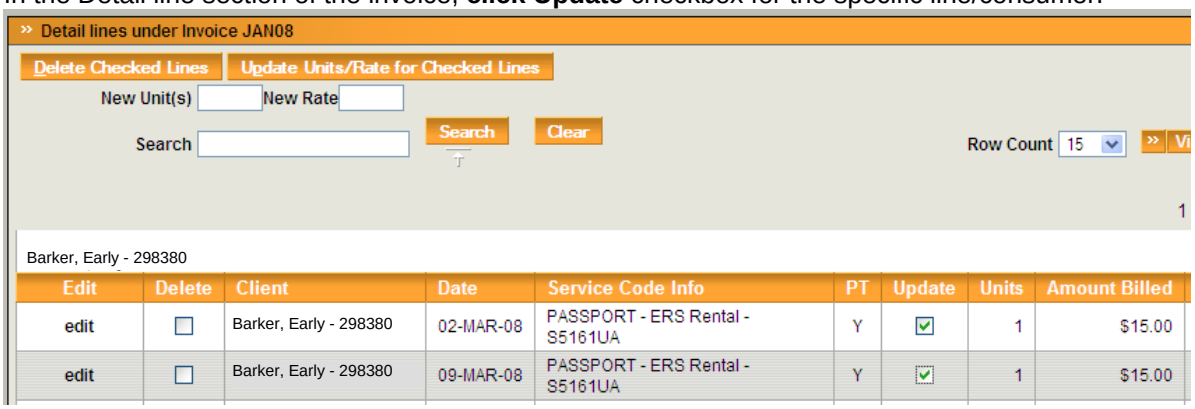
e) **Edit Rates** – PASSPORT Invoice

(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be edited from the Invoices in Progress table.

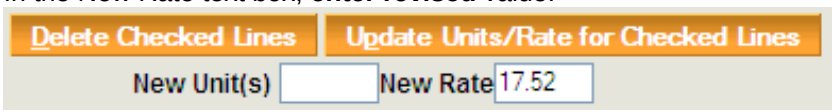
(3) Only rates for service code with Y = Passthru can be changed.

(4) In the Detail line section of the invoice, **click Update** checkbox for the specific line/consumer.



Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed
edit	☐	Barker, Early - 298380	02-MAR-08	PASSPORT - ERS Rental - S5161UA	Y	☑	1	$15.00
edit	☐	Barker, Early - 298380	09-MAR-08	PASSPORT - ERS Rental - S5161UA	Y	☑	1	$15.00

(5) In the New Rate text box, **enter revised** value.



(6) **Click Update Units/Rate for Checked Lines**.

(7) Confirmation will be generated by the system: Changes to Units/Rate for selected Consumers were made as requested. The change(s) will be reflected in the Detail lines section.

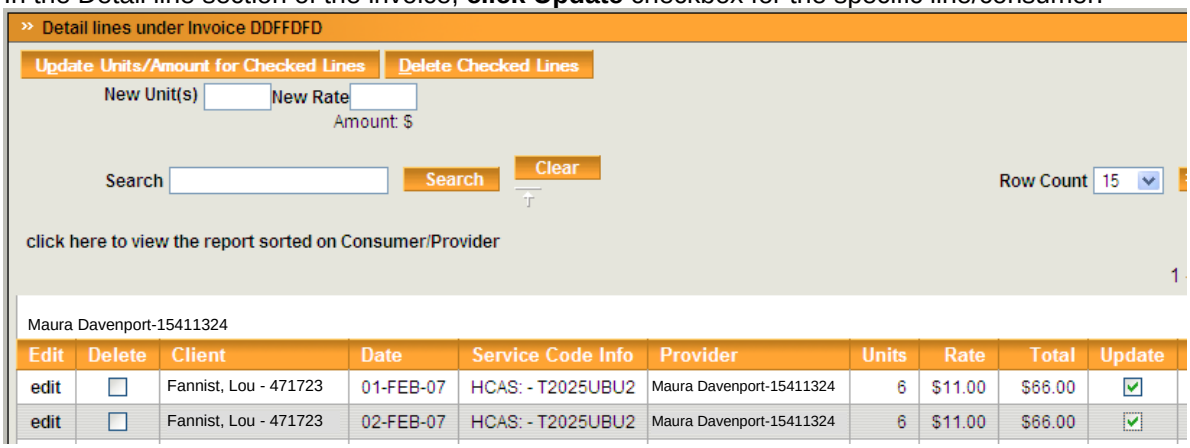
Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed
edit	☐	Barker, Early - 298380	02-MAR-08	PASSPORT - ERS Rental - S5161UA	Y	☐	1	$17.52
edit	☐	Barker, Early - 298380	09-MAR-08	PASSPORT - ERS Rental - S5161UA	Y	☐	1	$17.52
edit	☐	Barker, Early - 298380	16-MAR-08	PASSPORT - ERS Rental - S5161UA	Y	☐	1	$15.00

f) **Edit Units and Rates** – Choices Invoice

(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be edited from the Invoices in Progress table.

(3) In the Detail line section of the invoice, **click Update** checkbox for the specific line/consumer.

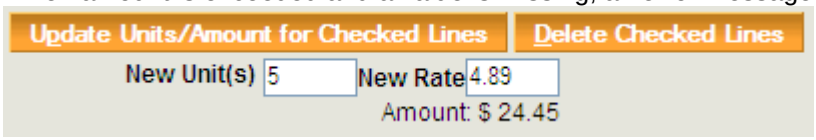


Edit	Delete	Client	Date	Service Code Info	Provider	Units	Rate	Total	Update
edit	☐	Fannist, Lou - 471723	01-FEB-07	HCAS: - T2025UBU2	Maura Davenport-15411324	6	$11.00	$66.00	☑
edit	☐	Fannist, Lou - 471723	02-FEB-07	HCAS: - T2025UBU2	Maura Davenport-15411324	6	$11.00	$66.00	☑

13. Edit or Delete an Invoice ***(cont'd.)***

f) Edit Units and Rates – Choices Invoice (cont'd.)

(4) In the New Rate text box, **enter revised rate**. In the New Unit(s) text box, **enter revised unit**. The amount cannot exceed $39.78 and a value for both Units and Rate must be entered. When amount is exceeded and a value is missing, an error message will be returned.



(5) **Click Update Units/Rate for Checked Lines**.

(6) Confirmation will be generated by the system: Changes to Units/Rate for selected Consumers were made as requested. The change(s) will be reflected in the Detail lines section.

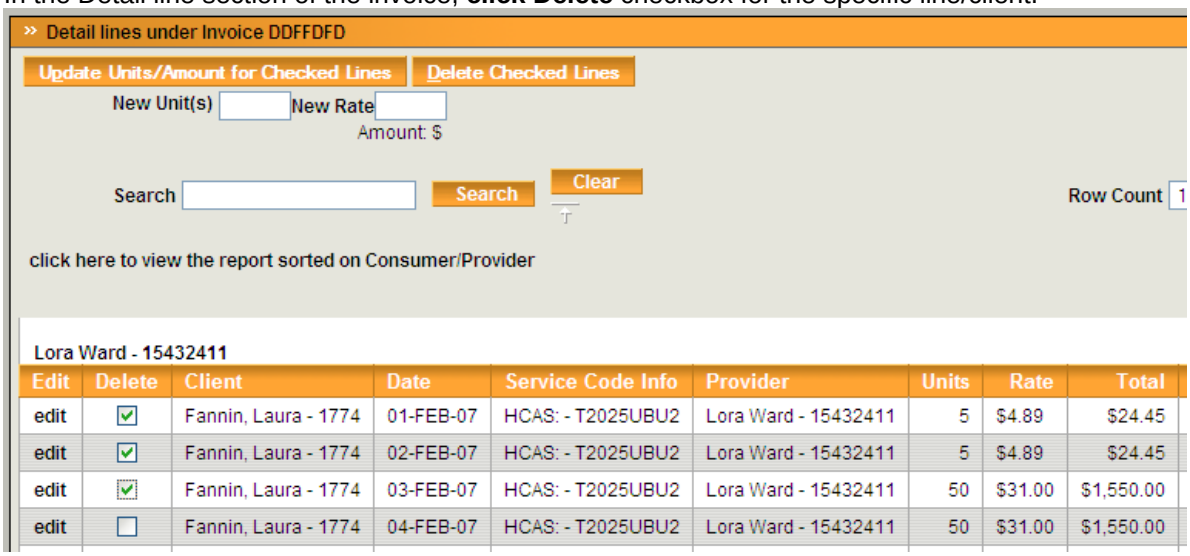
Edit	Delete	Client	Date	Service Code Info	Provider	Units	Rate	Total
edit	☐	Fannist, Lou - 471723	01-FEB-07	HCAS: - T2025UBU2	Maura Davenport-15411324	5	$4.89	$24.45
edit	☐	Fannist, Lou - 471723	02-FEB-07	HCAS: - T2025UBU2	Maura Davenport-15411324	5	$4.89	$24.45
edit	☐	Fannist, Lou - 471723	03-FEB-07	HCAS: - T2025UBU2	Maura Davenport-15411324	6	$11.00	$66.00

g) **Delete a Line**

(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be edited from the Invoices in Progress table.

(3) In the Detail line section of the invoice, **click Delete** checkbox for the specific line/client.



(4) **Click Delete Checked Lines** to remove the line(s) from the invoice.

h) **Edit an Individual Detail Line** – PASSPORT Invoice

Only these fields can be changed: Invoice comments, service code, units/amount, service date and comment about this line item. Passthru and client/consumer cannot be changed.

(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be edited from the Invoices in Progress table.

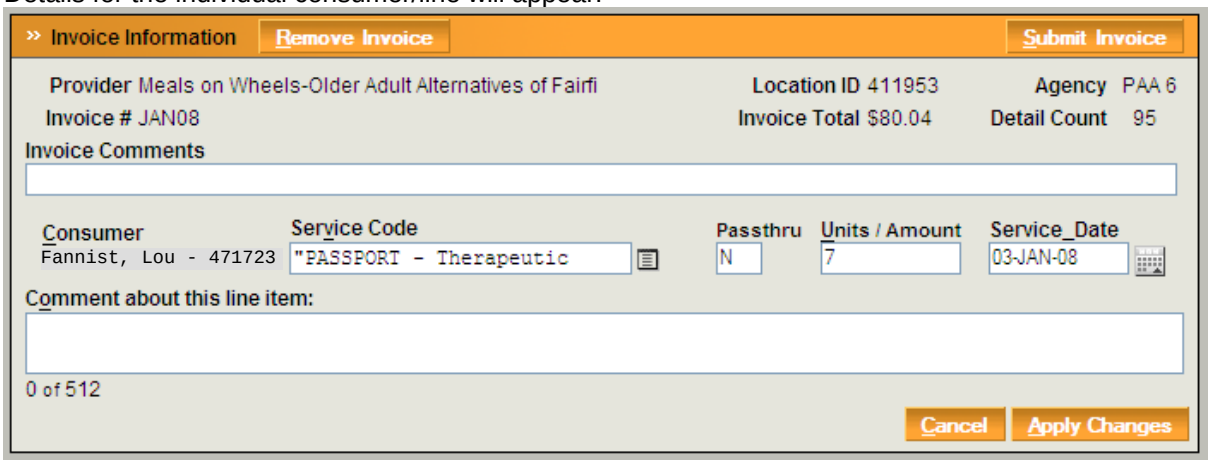
13. Edit or Delete an Invoice ***(cont'd.)***

h) Edit an Individual Detail Line – PASSPORT Invoice (cont'd.)

(3) In the Detail line section of the invoice, **click Edit** next to the individual client/line.

Edit	Delete	Client	Date	Service Code Info	PT	Update	Units	Amount Billed	Comm
edit	☐	Fannist, Lou - 471723	16-MAR-08	Assisted Living - 3rd tier - T2031U3	N	☐	1	$0.00	-

(4) Details for the individual consumer/line will appear.



(5) As necessary, make changes to Invoice Comments, Service Code, Units/Amount, Service Date and Comment about this line item.

i. **Click Apply Changes** to apply updates.

ii. **Click cancel** any changes/updates.

(6) The system will return a confirmation: Changes were applied to the selected detail line.

i) **Edit an Individual Line** – Choices Invoice

These fields can be changed: Invoice comments, service code, provider, service date, units, rate and comment about this line item. The client/consumer cannot be changed.

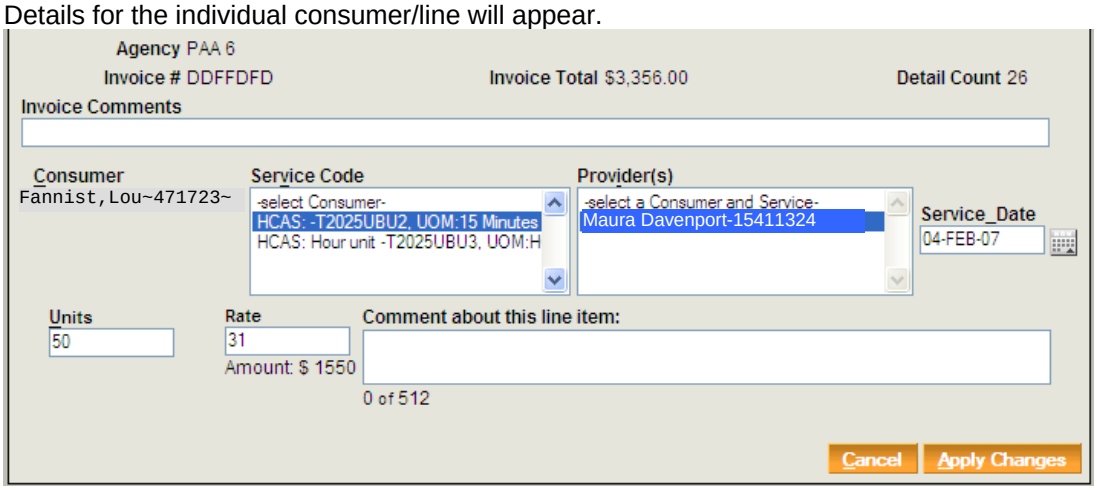
(1) **Click Invoices** to display the Invoices Status screen.

(2) **Select invoice** to be edited from the Invoices in Progress table.

(3) In the Detail line section of the invoice, **click Edit** next to the individual client/line.

Edit	Delete	Client	Date	Service Code Info	Provider	Units	Rate	Total
edit	☐	Fannist, Lou - 471723	01-FEB-07	HCAS: - T2025UBU2	Lora Ward - 15432411	5	$4.89	$24.45

(4) Details for the individual consumer/line will appear.



13. Edit or Delete an Invoice ***(cont'd.)***

i) Edit an Individual Line – Choices Invoice (cont'd.)

(5) As necessary, make changes to Invoice Comments, Service Code, Provider(s), Service Date, Units, Rate (Rate cap is $39.78. If the rate exceeds $39.78, an error message will be returned) and Comment about this line item.

i. **Click Apply Changes** to apply updates.

ii. **Click Cancel** to cancel any changes/updates.

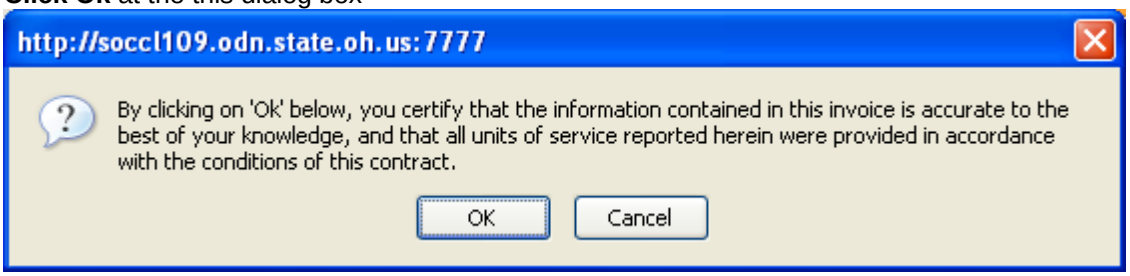
(6) The system will return a confirmation: Changes were applied to the selected detail line.

14. Submit Invoice

A submitted invoice cannot be deleted or edited. User is logged in as a Provider Operator, a Fiscal Intermediary, a PAA Admin or a PAA Operator working on behalf of a provider location.

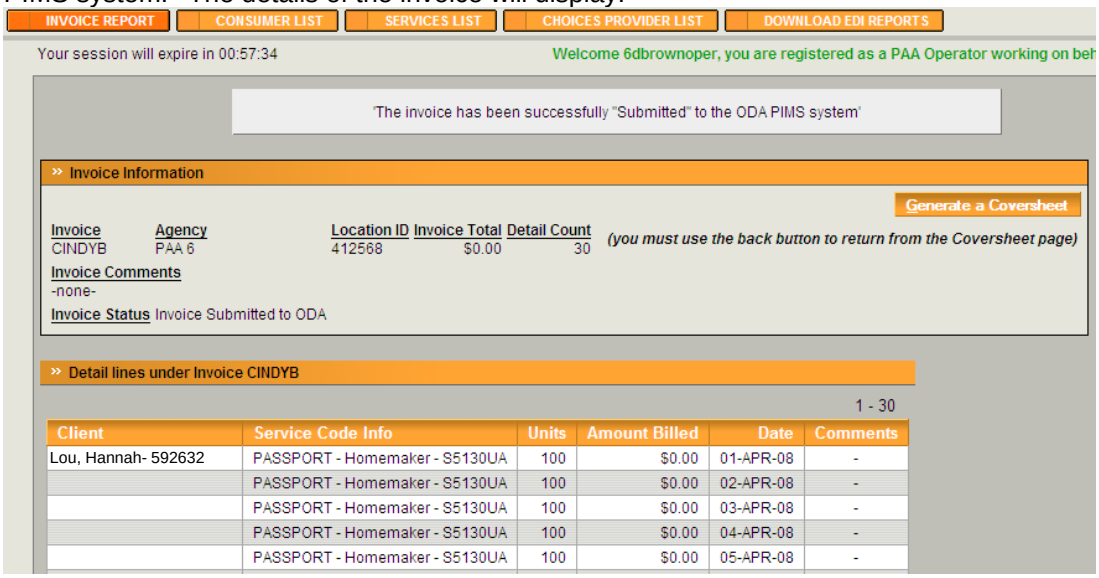
(1) Once all charges are entered and edits/changes confirmed, **click Submit Invoice**.

(2) **Click Ok** at the this dialog box



(3) **Click Cancel** to cancel the submit invoice process. User is brought back to the Invoice Information screen.

(4) System generates a confirmation: 'The invoice has been successfully "Submitted" to the ODA PIMS system.' The details of the invoice will display.



(5) As necessary, Generate Cover Sheet. See Section 15. Generate a Coversheet.

15. Generate a Coversheet

ODA does not have a requirement for a signed cover sheet and collecting a cover sheet from a provider is the discretion of the PAA. The Generate a Coversheet button becomes active once an invoice has been submitted.

a) User is logged in as a Provider Operator, a Fiscal Intermediary, a PAA Admin or a PAA Operator working on behalf of a provider location and invoice has been submitted.

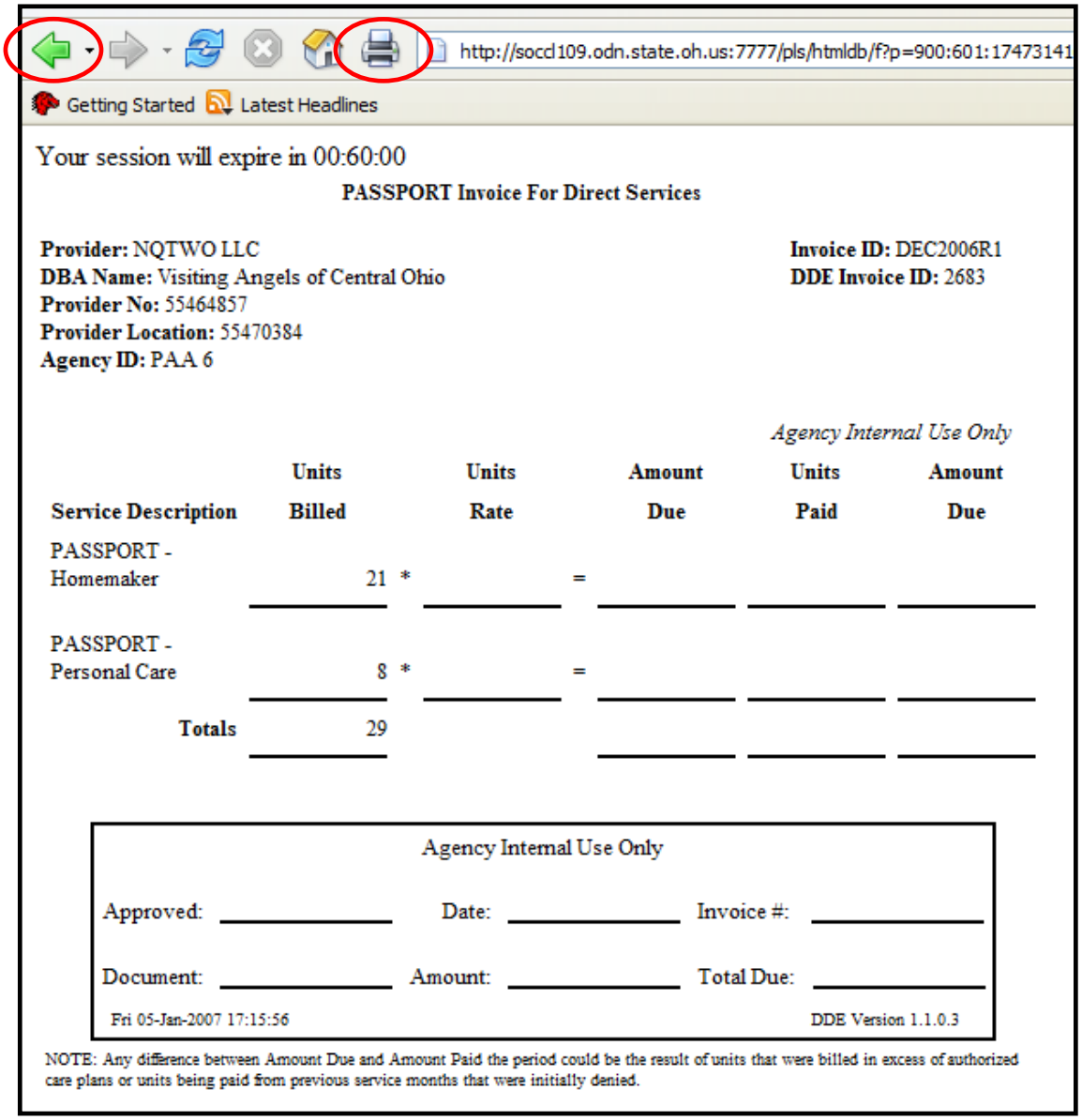
b) If necessary, **click Invoices** to display the Invoices Status screen.

c) **Select invoice** from the Invoices Status list.

d) **Click Generate a Coversheet** to create the PASSPORT Invoice for Direct Services or Choices Invoice For Direct Services coversheet.

e) **Click print button** to send to printer or click File and select Print.

f) **Click back button** to return to the submitted invoice details.



16. Invoice Status Views

- User is logged in as a PAA Administrator, PAA Operator, Fiscal Intermediary or Provider Operator, or a PAA Administrator or a PAA Operator working on behalf of a provider location.
- The PAA Administrator and PAA Operator Roles can view all invoices and view Provider invoices by working on behalf of a provider location. The Provider Operator's view is limited to their Authorized Location(s). The Fiscal Intermediary's view is limited to CHOICES invoices.
- **Click Invoices** to display the Invoice Status screen.

a) **Invoices by Status score card**

- The Invoices by Status scorecard is displayed at the bottom of every Invoice View. If no invoices are found, then "no data found" will be displayed.
- The table will list the status of all invoices for the PAA Administrator and PAA Operator Roles.
- The table for the Provider Operator Role will list the status of all invoices for their Authorized Location(s).
- The Fiscal Intermediary's view is limited to CHOICES invoices.

» Invoices by Status

Type	Invoice Status	Count
PIMS	Invoices in Progress	47
PIMS	Invoices Submitted to ODA	42
PIMS	Invoices Received by ODA	49
PIMS	Invoices Under Review	5
PIMS	Invoices with Remittance Advice	1
PIMS	Rejected Invoices	6
Choices	Invoices in Progress	2
Choices	Invoices Submitted to ODA	1
Choices	Invoices Received by ODA	5
Choices	Invoices with Remittance Advice	3

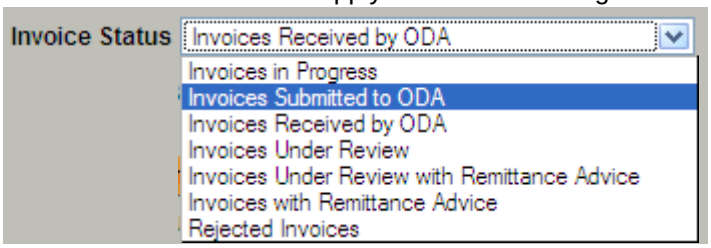
b) **Invoice Views Available** – PIMS and Choices

- **Invoices Received by ODA** – Displays invoices received by ODA PIMS/PASSPORT system.
- **Invoices Submitted to ODA** – Displays invoices sent to ODA PIMS/PASSPORT, but not acknowledged as received.
- **Invoices Under Review** – Displays invoice under review by an ODA agent or a process. No remittance available.
- **Invoices Under Review with Remittance Advice** – Displays invoices under review by an ODA agent or a process. Remittance advice available for a portion of the invoice.
- **Invoices In Progress** – Displays invoices in progress–not submitted to ODA. The user is able to select an invoice and make edits and changes. Invoices stay in progress until submitted.
- **Invoices with Remittance Advice** – Displays invoices paid with remittance advice available in DDE. The data is generated from the remittance advice report in PIMS.
- **Rejected Invoices** – Displays invoices rejected in full by case manager.

16. Invoice Status Views (cont'd.)

c) **Filter the List – Submitted Invoices only**

(1) **Click Invoice Status drop down arrow** and **select** an Invoice Status to be viewed. NOTE: This filter does not apply to Invoices in Progress.



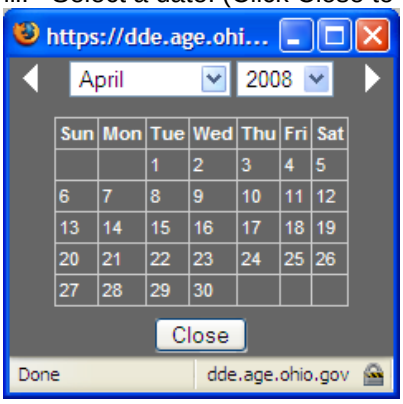
(2) **Click** the **Calendar** icon to display the calendar.

(3) Select a date.

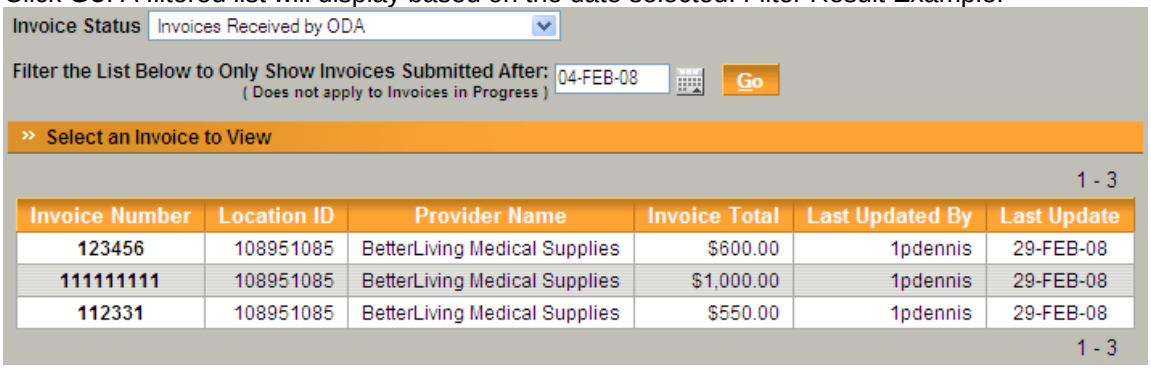
i. Click the forward/back icons to go forward/back a month

ii. Or click the drop down arrow next to the month or year to change the month or year.

iii. Select a date. (Click Close to close the dialog box without changing the date.)



(4) Click **Go**. A filtered list will display based on the date selected. Filter Result Example:



(5) Click a column heading to sort data in ascending or descending order.

(6) Click an invoice number to view the details or to finish an invoice in progress.

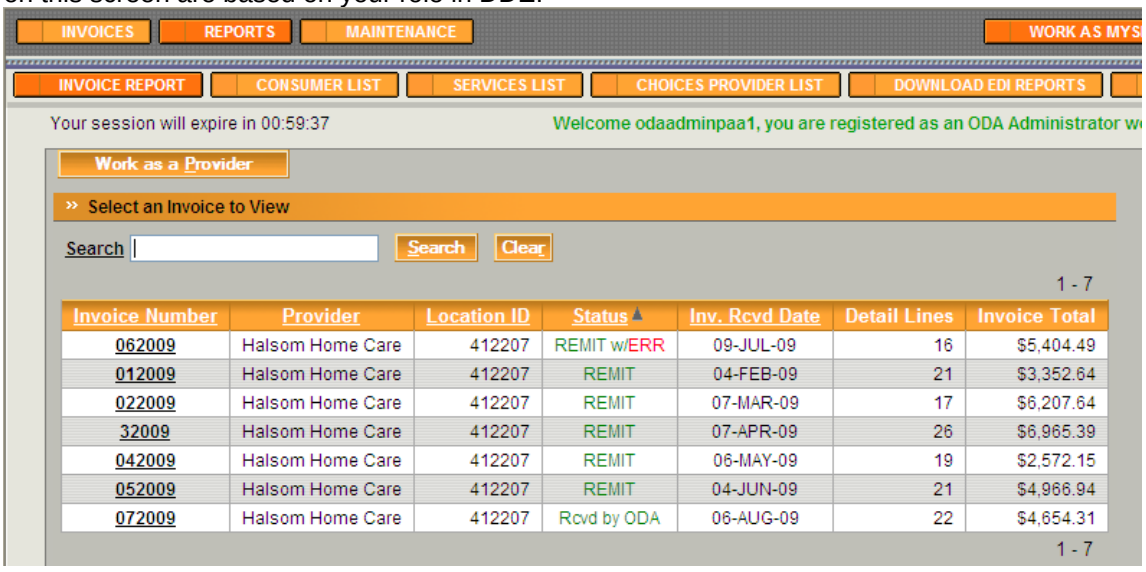
17. Reports

- The PAA Administrator and PAA Operator Roles can display all Passport and Choices invoices and Choices Provider List for their site. The PAA Administrator and PAA Operator Roles must work on behalf of a provider to display the Consumer List, Services List and to Download EDI reports. The PAA Administrator can view usage stats.
- The Fiscal Intermediary Role display is limited to Choices reports and Choices consumer, service and provider lists.
- The Provider Operator Role display is limited to their authorized location(s).
- The Provider Operator Reports Only Role display is limited to Download EDI Reports for their authorized location(s).

Reports Screen	Invoice Report	Consumer List	Services List	Choices Provider List	Download EDI Reports	Usage stats
PAA Administrator	X	X	X	X	X	X
PAA Operator	X	X	X	X	X	
Fiscal Intermediary	X	X	X	X		
Provider Operator	X	X	X		X	
Provider Operator Reports Only					X	

a) **Invoice Report**

(1) **Click Reports**. A list of invoices displays showing Invoice Number, Provider name, Provider Location ID, Status, Inv Received Date, Details Lines and Invoice Total. The options available on this screen are based on your role in DDE.



(2) Click a column heading to sort data in ascending or descending order.

(3) The first 30 rows displays. Click Next to display the next 30 rows. Click Previous to go back 30 rows.

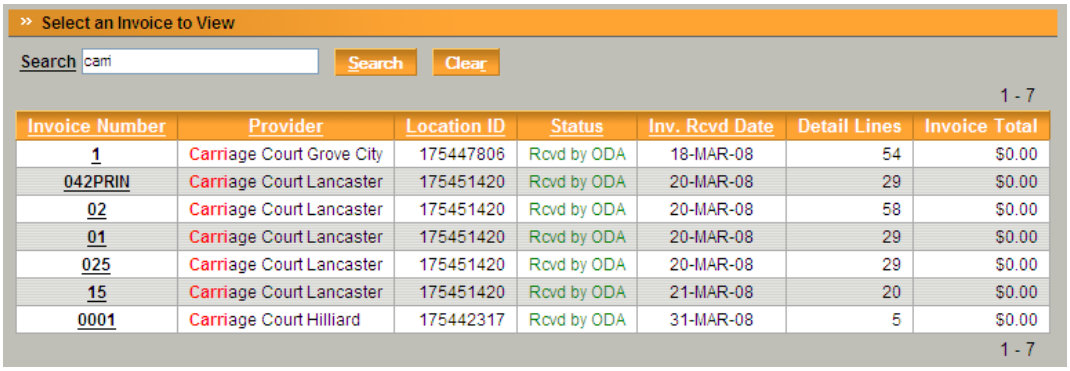
17. Reports (cont'd.)

a) Invoice Report (cont'd.)

(4) Search for an Invoice:

i. **Enter search string** in the Search text box. Invoice Number, Agency, Location ID, Status and Received Date are searched.

ii. **Click Search**. The results of the search display. Click Reset to display the entire list and clear the text box.



iii. **Select an invoice** to display the Invoice information, Details Lines and to Generate a Coversheet. Click the browser's back button to go back to the Invoice Report List.

(5) Status Column displays current status of the invoice.

- **Rcvd by ODA** – Invoice received by ODA PIMS/PASSPORT system.
- **REMIT** – Invoice was submitted and adjudicated in PIMS. A Remittance Advice (RA) was created and available for download on the Download EDI Reports page. The Download EDI Reports page displays reports available for download for the last 90 days.
- **REMIT W/ERR** – Invoice was submitted to PIMS and a RA was created, but at least one billable was adjusted or denied during adjudication. To find adjusted or denied claim, download the RA report (for the invoice in question) from the Download EDI Reports page. The Download EDI Reports page displays reports available for download for the last 90 days.
- **SUBMITTED** – Invoice sent to ODA PIMS/PASSPORT, but not acknowledged as received.
- **WIP** (Work in Progress) – Invoice in progress, but not submitted to ODA. User is able to select and edit invoice. Invoices stay in WIP until submitted.

b) **Consumer List – PASSPORT or Choices**

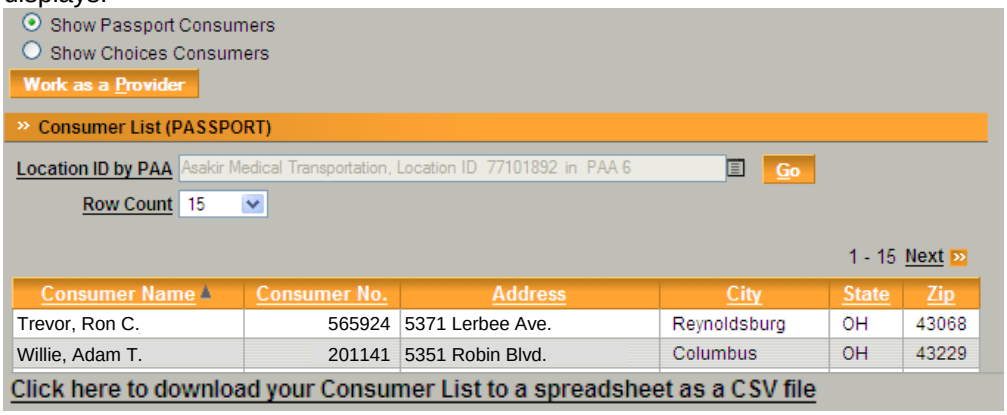
(1) User is logged in as Provider Operator, Fiscal Intermediary or a PAA Administrator/PAA Operator working on behalf of a Provider Operator to view the Consumer List.

(2) **Click Consumer List**. A report of Consumers specific to the location ID will display.

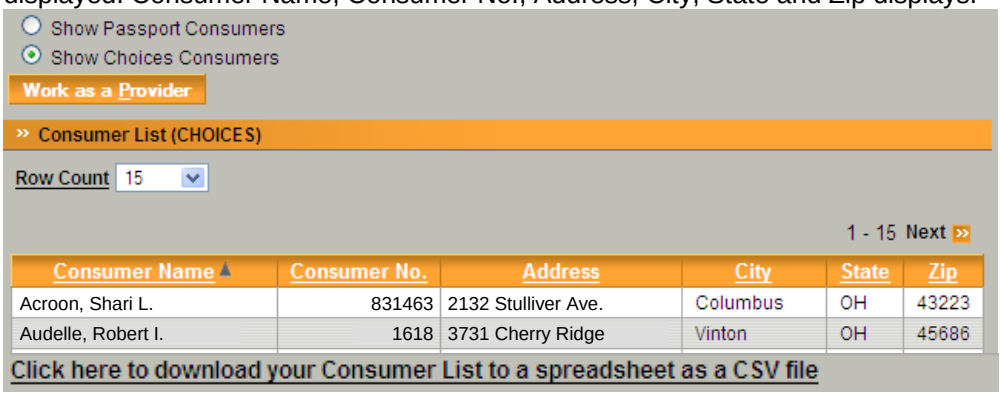
17. Reports (cont'd.)

b) Consumer List – PASSPORT or Choices (cont'd.)

(3) Show Passport Consumers: The "Show Passport Consumers" is selected by default and Passport Consumers display. Consumer Name, Consumer No., Address, City, State and Zip displays.



(4) Show Choices Consumers: Click "Show Choices Consumers" to change the list of consumers displayed. Consumer Name, Consumer No., Address, City, State and Zip displays.



(5) If no consumers are found, the system will display: No Consumers found for this Agency.

(6) Click a column heading to sort data in ascending or descending order.

(7) The first 15 rows displays. **Click Next** to display the next 15 rows. **Click Previous** to go back 15 rows. Click Row to display up to 10,000 rows.

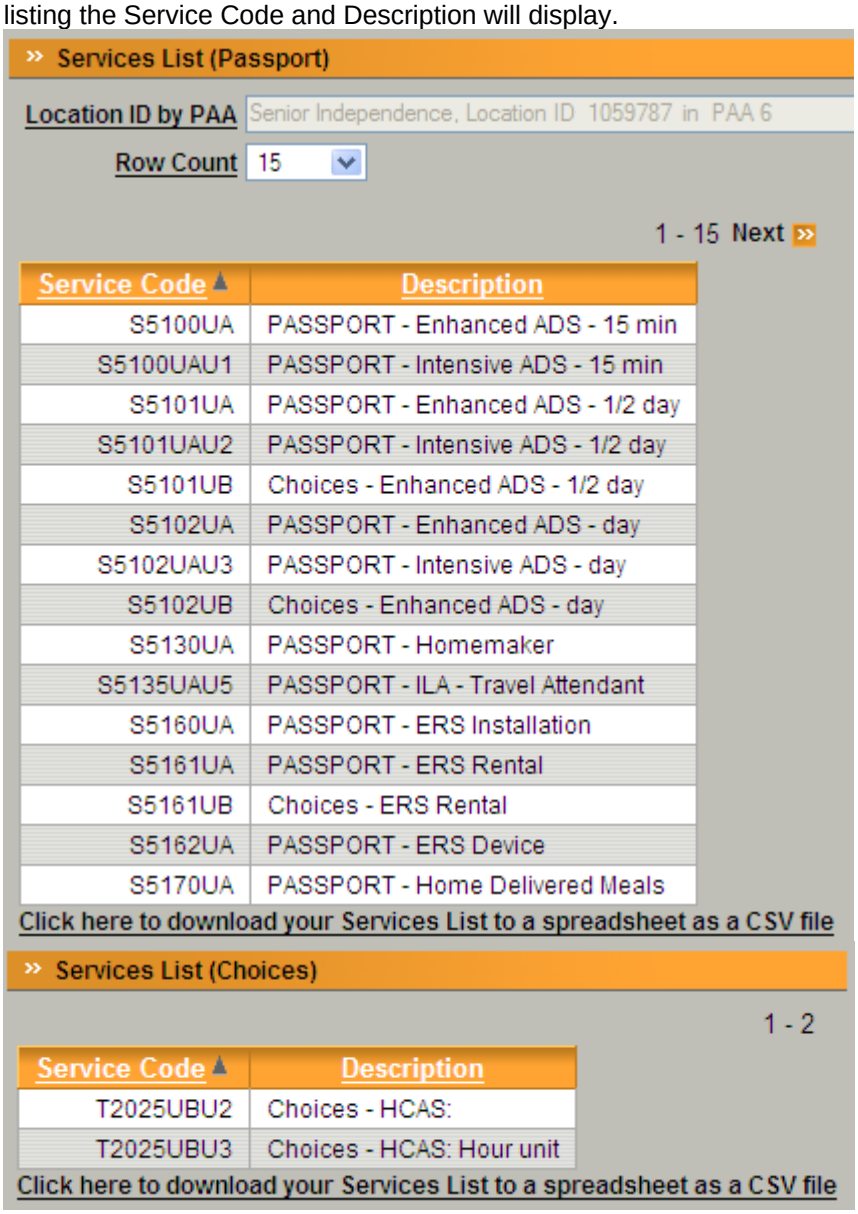
(8) To download the report, click "**Click here to download your Consumer List to a spreadsheet as a CSV file**." CSV = Comma Separated Values. Follow the browser's download instructions to open with Microsoft Excel or save to Disk.

17. Reports (cont'd.)

c) **Services List – PASSPORT and Choices**

(1) User is logged in as Provider Operator, Fiscal Intermediary or a PAA Administrator/PAA Operator working on behalf of a Provider Operator. Services for Choices displays for Choices Provider Operators, Fiscal Intermediary and PAA Administrator/PAA Operator Roles.

(2) **Click Services List**. A report, specific to the location ID, of Passport and/or Choices Services listing the Service Code and Description will display.



(3) Click a column heading to sort data in ascending or descending order.

(4) The first 15 rows displays. **Click Next** to display the next 15 rows. **Click Previous** to go back 15 rows. Click Row to display up to 10,000 rows.

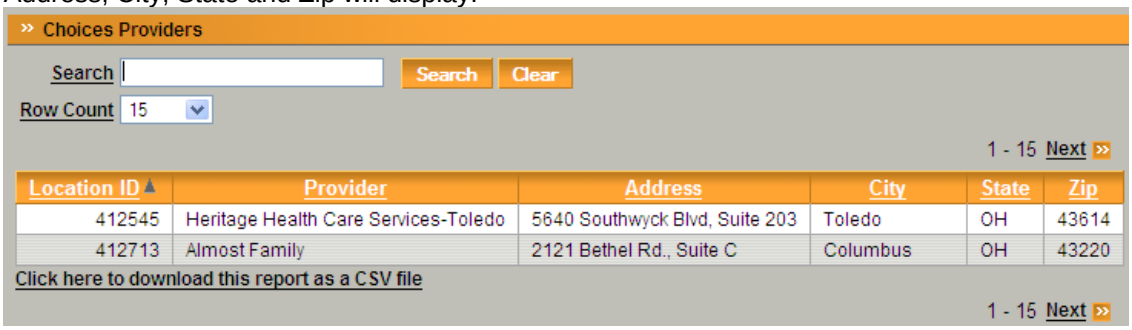
(5) To download the report, click "**Click here to download your Services List to a spreadsheet as a CSV file**." CSV = Comma Separated Values. Follow the browser's download instructions to open with Microsoft Excel or save to Disk.

17. Reports (cont'd.)

d) **Choices Provider List**

(1) User is logged in as Fiscal Intermediary, PAA Administrator or PAA Operator to view the Choices Providers List.

(2) **Click Choices Provider List**. A report of Choices Providers listing the Location ID, Name, Address, City, State and Zip will display.



(3) Click a column heading to sort data in ascending or descending order.

(4) The first 15 rows displays. **Click Next** to display the next 15 rows. **Click Previous** to go back 15 rows. Click Row to display up to 10,000 rows.

(5) To download the report, click "**Click here to download your Services List to a spreadsheet as a CSV file**." CSV = Comma Separated Values. Follow the browser's download instructions to open with Microsoft Excel or save to Disk.

e) **Download Electronic Data Interchange (EDI) Reports**

(1) User is logged in as Provider Operator, Provider Operator Reports Only or PAA Administrator/ PAA Operator working on behalf of a Provider Operator. Fiscal Intermediary role cannot download EDI reports.

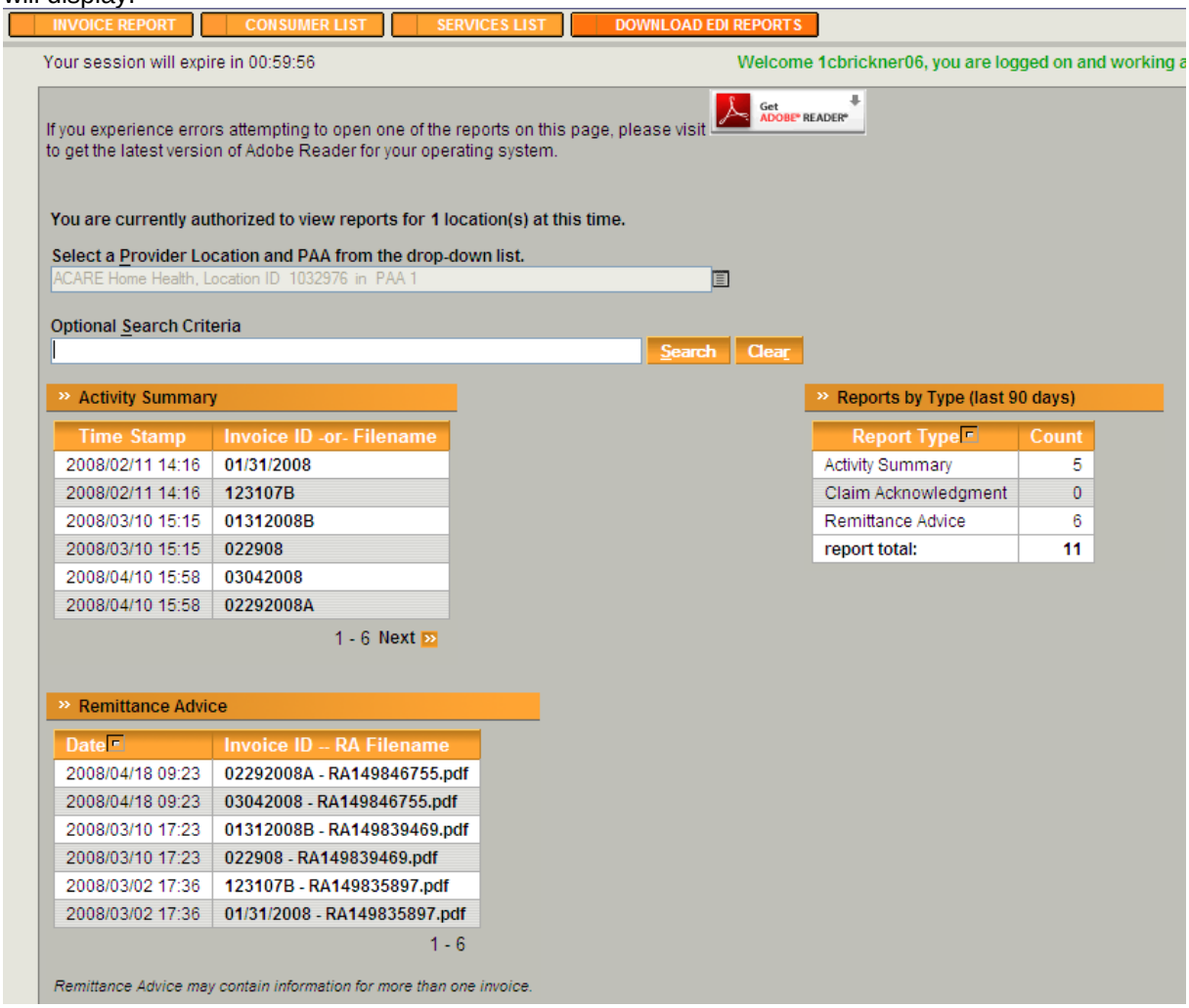
(2) A table of reports available for download for the last 90 days will display.

(3) Reports are in PDF format and Adobe Reader is needed in order to open the file. If Adobe Reader is not installed, click Get Adobe Reader to download and install the latest version of Adobe Reader on your operating system.

17. Reports (cont'd.)

e) Download EDI Reports (cont'd.)

(4) **Click Download EDI Reports**. A table of reports available for download for the last 90 days will display.



(5) Reports Available for Download

- **Reports by Type (last 90 days)** – Displays a scorecard of total reports available for download for the last 90 days.
- **Activity Summary** – Status of report of invoices submitted.
- **Claims Acknowledgment** – Report of rejected claims.
- **Remittance Advice** – Remittance Advice reported generated from PIMS.

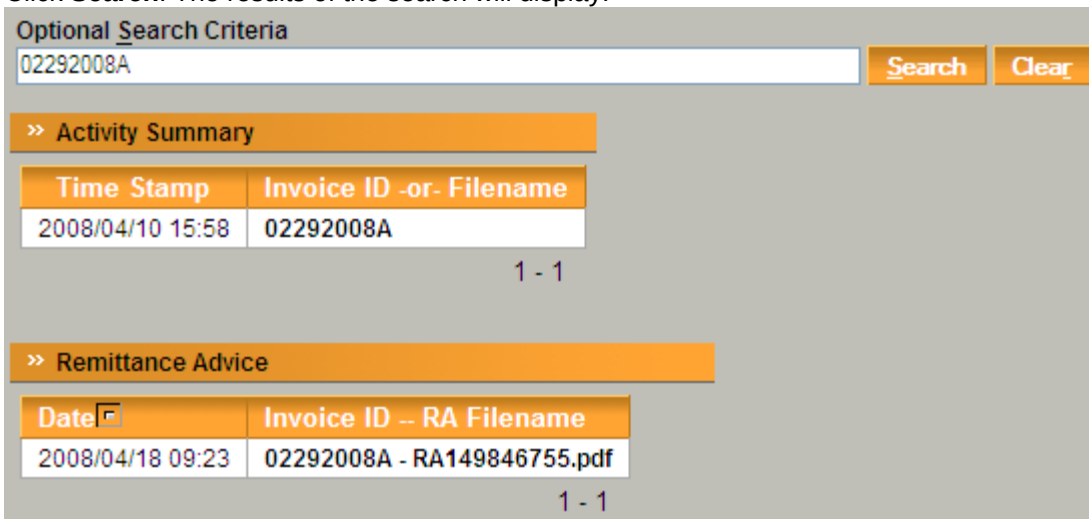
17. Reports (cont'd.)

e) Download Electronic Data Interchange (EDI) Reports (cont'd.)

(6) Search for a Report

i. In the "Optional Search Criteria" text box, **enter a search string** that is contained in the Invoice ID or Date timestamp.

ii. Click **Search**. The results of the search will display.



iii. **Click Clear** to clear the search text box and display all available reports.

(7) Open a Report

i. The reports are in PDF format. In order to open/view the report, Adobe Reader must be installed.

ii. Click **Filename** of the report.

iii. Follow the browser's instructions to either Open or Save the report.

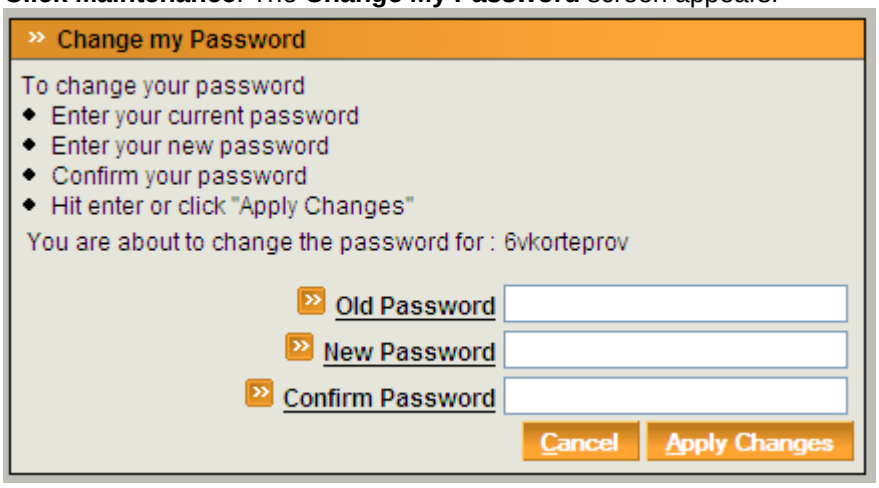
f) Usage Stats

The Usage Stats function is specific to the PAA Administrator Role. This function is covered in detail in the PAA Administrator Role User Maintenance Manual.

18. Maintenance

a) Change My Password

(1) **Click Maintenance**. The **Change My Password** screen appears.



(2) To change your password:

i. **Enter current password.**

ii. **Enter new password.**

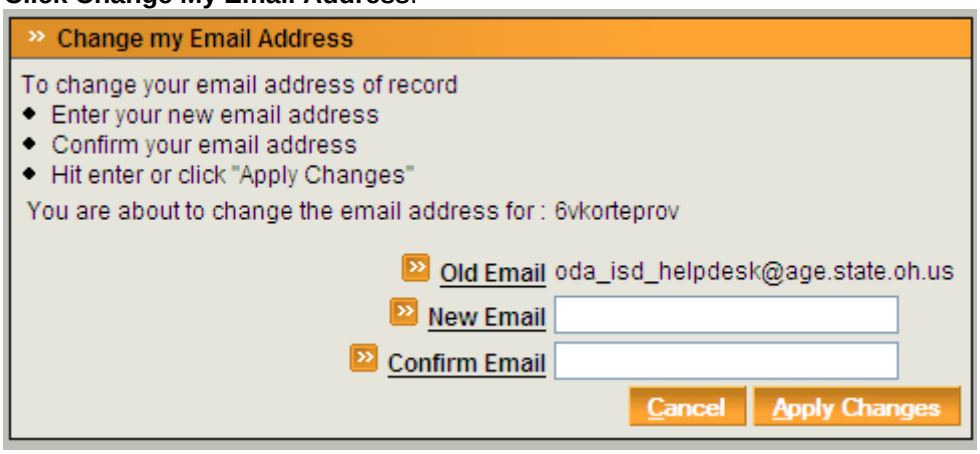
iii. **Confirm password.**

iv. **Click Apply Changes**. Click Cancel to cancel change password request.

b) Change My Email Address

(1) **Click Maintenance**.

(2) **Click Change My Email Address**.



(3) To change your email address:

i. **Enter new email address.**

ii. **Confirm email address.**

iii. **Click Apply Changes**. Click Cancel to cancel the change email address request.

18. Maintenance (cont'd).

c) Research Assistant

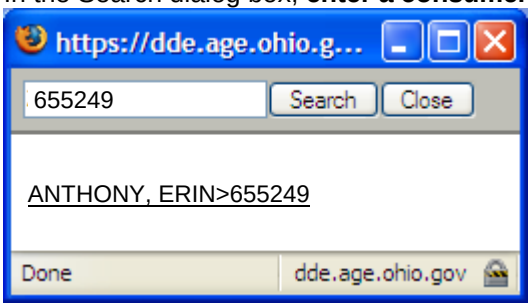
- Research Assistant function is specific to the PAA Administrator and PAA Operator Roles.
- Use the Research Assistant tool to display a list of all Service Codes, including Service Begin and End Date, the Consumer has on file in the DDE application as of the current day.
- Data is based on the information the consumer has on record in PIMS.
- Changes/updates made in PIMS for a consumer will be reflected in the DDE system the following day. Updates from PIMS to the DDE system are made nightly.

(1) **Click Maintenance**

(2) **Click Research Assistant**.

(3) **Click** the **List Box icon** to the right of the Client Number text box.

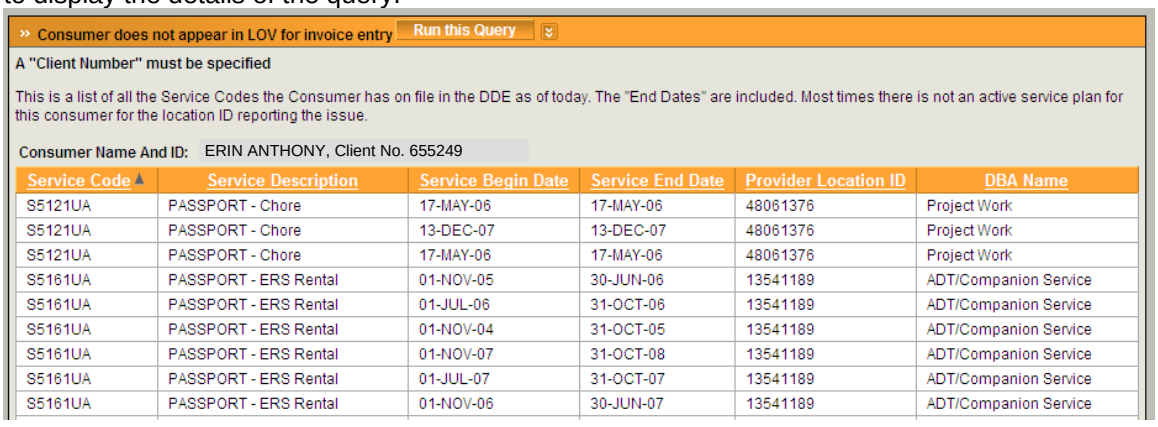
(4) In the Search dialog box, **enter a consumer number** and **click Search**.



(5) **Select Consumer's name**. The dialog box will close and the client name and number will appear in the text box in gray text.

(6) **Click Go**.

(7) In the "Consumer does not appear…" section, **click orange much greater than** icon >> to display the details of the query.



Service Code	Service Description	Service Begin Date	Service End Date	Provider Location ID	DBA Name
S5121UA	PASSPORT - Chore	17-MAY-06	17-MAY-06	48061376	Project Work
S5121UA	PASSPORT - Chore	13-DEC-07	13-DEC-07	48061376	Project Work
S5121UA	PASSPORT - Chore	17-MAY-06	17-MAY-06	48061376	Project Work
S5161UA	PASSPORT - ERS Rental	01-NOV-05	30-JUN-06	13541189	ADT/Companion Service
S5161UA	PASSPORT - ERS Rental	01-JUL-06	31-OCT-06	13541189	ADT/Companion Service
S5161UA	PASSPORT - ERS Rental	01-NOV-04	31-OCT-05	13541189	ADT/Companion Service
S5161UA	PASSPORT - ERS Rental	01-NOV-07	31-OCT-08	13541189	ADT/Companion Service
S5161UA	PASSPORT - ERS Rental	01-JUL-07	31-OCT-07	13541189	ADT/Companion Service
S5161UA	PASSPORT - ERS Rental	01-NOV-06	30-JUN-07	13541189	ADT/Companion Service

(8) Click a column heading to sort in ascending or descending order. It may be necessary to click the orange much greater than icon >> again to display the details of the query.

d) User Maintenance and Email Lists

User Maintenance and Email Lists functions are specific to the PAA Administrator Role. These functions are covered in detail in the PAA Administrator Role User Maintenance Manual.